

STRATEGIC PLAN



Summer 2018

DANCE/USA 1029 Vermont Ave NW, Suite 400, Washington, DC 20005



September 4, 2018

Dear Colleagues:

It is my pleasure to share with you Dance/USA's new strategic plan. The following materials are the culmination of over a year of planning activities with the Board of Trustees, staff, and planning consultants. Led by consultant Ebony Noelle Golden, Founder and CEO of BDAC, the planning process allowed us to weave together social justice, financial sustainability, and technology. Our planning process was further supported by Kim Ondreck Carim, Founder and Principal of Strategy:Next (and Former CFO with San Francisco Ballet), and Diana Pan, Chief Technology Officer at The Museum of Modern Art. I am tremendously grateful for the thought, care, and intelligence that our Board, staff, and consultants put into creating this plan.

Dance/USA is continuing on its journey to be an ever-more relevant and sustainable association. For the past several years, we have been evolving to become a more welcoming organization to the wider dance field. With this plan, we now have aligned the language of our mission, vision, values, and priorities with the organization we are and want to become. In addition, we have incorporated our new fourth core service of archiving and preservation into our mission. In many ways, this is a first step of truly beginning to be, authentically, the organization that we want and need to be.

Dance/USA is undergoing a long-term transformation and therefore, this plan will be implemented on an iterative basis. Phase I will be carried out during the first 18 months and will focus on a series of community conversations across the nation; investing in the organization's internal knowledge base; fundraising capacity; and technology. Phase II, a two-year period, will see the decommissioning of select programs; revision of other select programs; website redesign and launch; and the completion of the initial strategic transformation. This iterative and phased-in approach includes feedback loops, course corrections, and room to fail.

The following materials outline Dance/USA's new vision, re-articulated mission, guiding priorities, core values, and plan goals. I encourage you to read these materials and to reach out to me, directly, with your questions at afitterer@danceusa.org.

The future holds great opportunity for the field of dance and Dance/USA to expand our peer networks, our relevance in society, and our understanding of and respect for all genres of dance.

Sincerely,

A handwritten signature in blue ink that reads "Amy Fitterer".

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Amy Fitterer
Executive Director

THE PLANNING PROCESS

Ebony Noelle Golden, Founder and CEO, BDAC, designed a rigorous planning process for Dance/USA. We started by looking back at our last strategic plan and then looking to the future and to the impact we wanted to have on the world. The process allowed for important and needed conversation among board members, staff, and stakeholders.

- Stakeholder Interviews
Roughly 50 individual interviews conducted by BDAC with Dance/USA staff, the strategic planning committee, additional Trustees, leaders of national arts service organizations, and members.
- Desk Research
Reviewed extensive information on Dance/USA programs, previous strategic plans, finances, and equity and inclusion plans.
- Strategic Planning Committee
The strategic planning committee held monthly meetings.
- Two Retreats for Planning Committee
The SPC gathered to address desired big-picture impact, relevance of current programs, organizational values, and long-term vision, values, and priorities.
- Staff Intensives
BDAC met with Dance/USA staff for in-person interviews, to review drafts of the plan elements, develop breakthrough objectives, brainstorm 3-5 year goals, and address annual objectives, among other activities.
- EID Learning Labs
BDAC facilitated six Equity, Inclusion, and Diversity Learning Labs between May and November 2017. EID Learning Labs were open to all staff and Board. The Labs covered topics such as intersectionality, disability justice, gender equity, and systems of power and privilege.
- Business Planning Subcommittee
The Business Planning Subcommittee of the larger Strategic Planning Committee met regularly and discussed topics such as earned revenue ideas and the framework for building Dance/USA's business plan.
- Technology Assessments
Technology Advisor Diana Pan collected information on how Dance/USA currently uses technology and how technology can help the organization reach its strategic vision.
- Full Board Discussions and Updates on the Strategic Plan
The Board of Trustees participated in discussions and updates on the strategic planning process in June 2017, November 2017, April 2018, May 2018, and June 2018.

VISION

Propelled by our belief that dance can inspire a more just and humane world, Dance/USA will amplify the power of dance to inform and inspire a nation where creativity and the field thrive.

MISSION

Dance/USA champions an inclusive and equitable dance field by leading, convening, advocating, and supporting individuals and organizations. Dance/USA's core programs are focused in the areas of engagement, advocacy, research, and preservation.

- **Engagement.** Dance/USA engages and activates its network through meaningful programs, convenings, and educational opportunities.
- **Advocacy.** Dance/USA advocates for the increased visibility of, and engagement in, dance and for government policies that positively impact the dance field on a national, regional, and local level.
- **Research.** Dance/USA provides rigorous, relevant, and accessible research on the dance field.
- **Preservation.** Dance/USA provides resources and programs to advance the archiving and preservation of America's dance legacy.

GUIDING PRIORITIES

- **Equity and Justice:** Dance/USA cultivates and advances systems and practices of equity and justice at all levels of the organization.
- **Partnerships:** Dance/USA builds and sustains partnerships that align with our core values, advance equity goals, and elevate the work of the dance field.
- **Technology:** Dance/USA conducts its programs, services, and operations through technology, increasing efficiency, impact, and visibility.
- **Financial Sustainability:** Dance/USA optimizes its impact with a financially sustainable business model.

CORE VALUES

Creativity	Connectivity	Equity	Integrity
<p>Creativity inspires change. Dance/USA values our nation's creative capacity and artistry to imagine and build a world we have never encountered and deeply desire.</p>	<p>Dance/USA strives to be a catalytic network enlivened by connection, community, and collaboration. We value calling people in (as opposed to calling people out) as a practice of leading, listening, learning, and deepening our impact.</p>	<p>Through the lens of equity, Dance/USA strives to remove the boundaries erected by a legacy of racism, classism, ableism, ageism, homophobia, transphobia, sexism, gender bias, and xenophobia and we work to dismantle institutional and systemic oppression that attack the dance field's progress, impede the creation of work, and negatively impact dance audiences and communities.</p>	<p>Integrity is critical to our organizational culture and the way we lead, serve, and collaborate with the dance field. We seek to provide transparency about our internal processes, professional resources, and information about the field.</p>

GOALS

Dance/USA has identified six goals to advance our impact on the dance field and strengthen our ability to fulfill our mission. Action steps will be taken on an iterative process in order to allow the organization to remain adaptive. We will build our ongoing strategic muscle as we take action, assess progress, design next steps, and take action again.

- Goal 1: Continue to incorporate equitable practices and policies into the organization's programs and operations.
- Goal 2: Re-affirm the value of membership.
- Goal 3: Establish and strengthen partnerships with value-aligned organizations.
- Goal 4: Sustain and increase operational and financial sustainability.
- Goal 5: Measure and articulate the organization's impact.
- Goal 6: Utilize technology to improve operational efficiency, maximize prior technology investments, and modernize online presence

GOAL 1: CONTINUE TO INCORPORATE EQUITABLE PRACTICES AND POLICIES INTO THE ORGANIZATION'S PROGRAMS AND OPERATIONS.

Goal 1 Background

Since 2011, Dance/USA has been working to address issues of equity, inclusion, and diversity throughout the organization. In 2012, Dance/USA hired an equity consultant to work with the organization for a 12-month period. In 2013, the organization established a Board Committee on Equity, Inclusion, and Diversity which drafted Dance/USA's Core Values Statement and Commitment to EID. The Board and staff have been through workshops and learning on equity and inclusion and the demographics of the Board and staff have shifted to be more reflective of the communities served. Over the past six years, Dance/USA's conference programming, re-granting, leadership training program, networking groups, advocacy actions, and research have evolved to better align with the core values of equity and inclusion. New programs over the past several years, such as Dance Business Bootcamp, the Staff Residency Program, and Regional Dance Forums, have been designed in line with the core values as well.

Dance/USA is on a continuum of learning as it becomes more inclusive of all dance makers and administrators. This goal will move Dance/USA further ahead on the path of evolution.

Action Steps, Goal 1

A. Analysis

- Refresh the organization's language and understanding about what it means for Dance/USA to operate with "equity at our core."
- Re- apply an equity lens as follows:
 - Analyze operations to uncover and reallocate structures of power and privilege.
 - Analyze the ways in which historical practices that have created barriers to access in the arts and culture field, specifically within the dance field.
- Conduct a baseline census of Dance/USA's service population.
- Conduct a baseline self-assessment survey of the Board's and staff's equity and justice competencies.
- Review vendor/supplier relationships for commitment to Dance/USA's values.
- Assess Board Committees' priorities to support the new strategic plan's goals.

B. Decisions and Modifications

- Continue to place new voices and perspectives in roles of power in the organizational structure.
- Conduct a series of Community Conversations across the nation to establish and/or strengthen relationships with dance artists and administrations and to inform shifts in the organization's programs and policies.
- Continue to build staff and board skills and knowledge around equity and justice and consider how those values inform and evolve the dance field.
- Establish a new position within Dance/USA to support the implementation of this plan, and the ongoing prioritization of equity within the organization's operations and programs.

Outcome, Goal 1: Dance/USA operates with equity at our core -- informing our business structure, Board and staff composition, policies, and programs -- and supports the field to do the same. Dance/USA places individuals of ALAANA descent, LGBTQ individuals, and people with disabilities at the center of its decision-making.

GOAL 2: RE-AFFIRM THE VALUE OF MEMBERSHIP AND ENGAGEMENT

Goal 2 Background

In the United States, there are more than 1,200 501c3 dance ensembles (as of 2014) plus countless more groups that are fiscally sponsored. There are more artists working in more dance styles and genres than can be documented, accurately. The environment in which dance is created and shared is in constant change: revenue is coming from different sources in different amounts; technology is always evolving; and there is tremendous competition for the public's free time and money. What is a national association's refreshed value proposition to its members, and a large constituent base, in this constantly changing environment?

Action Steps, Goal 2

- Conduct a series of Community Conversations across the nation to continue to invite new voices in to membership and also engage longtime members, whose voices and presence is valued. The conversations will inform Dance/USA's member benefits, programs, and services.
- Create a refreshed value proposition.

Outcome, Goal 2: The value that Dance/USA creates for its constituents is well defined and makes engaging with the organization an easy decision for anyone in the dance field. Dance/USA's membership requirements and benefits reflect the organization's commitment to addressing historic inequities in the dance field.

GOAL 3: ESTABLISH AND STRENGTHEN PARTNERSHIPS WITH VALUE-ALIGNED ORGANIZATIONS.

Goal 3 Background

In order for Dance/USA to engage with a wide array of dance makers, the organization will utilize partnerships to provide the greatest support to the dance field. Dance/USA has a history of collaborating with like-minded organizations, particularly in the areas of federal advocacy, convenings, equity & justice, and leadership training.

Action Steps, Goal 3:

- Grow Dance/USA's ability to foster networks within the field. Utilizing network building theory, and working with like-minded organizations, these networks will identify potential partners with shared values and allow for better dissemination resources and support for those in the dance field.
- Establish partnerships with groups that are already doing the work to help move equity work forward in the dance field comprehensively.
- Identify dance organizations that have a proven-track record of operating with equity and inclusion at their core and help provide visibility for those organizations.

Outcome, Goal 3: Through strategic partnerships with value-aligned organizations, Dance/USA co-creates and catalyzes a more equitable dance field and amplifies, at a national level, exemplary services and activities happening in local communities where our members are consistently innovating in the field of dance. Through partnership, Dance/USA provides support to the national dance field.

GOAL 4: INCREASE OPERATIONAL AND FINANCIAL SUSTAINABILITY

Goal 4 Background

Dance/USA will grow and diversify its revenue sources to increase its operational and financial sustainability. Dance/USA will assess and address staff capacity issues and champion a culture of collaboration and efficiency.

Action Steps, Goal 4:

- Design and implement new strategies for individual giving.
- Establish an Earned Revenue Working Group to design and test the viability of prospective earned income activities.
- Assess the structure by which the Board can further support Dance/USA's financial sustainability.
- Prioritize opportunities for staff collaboration.
- Assess and address the organizational skill-set gaps.

Outcome, Goal 4: Dance/USA has an organizational culture, rooted in equity and collaboratively led, that embraces listening, learning, communicating, professional development, and technology solutions. The organization's expense structure is efficient and its capacity is appropriately sized to its strategic goals.

GOAL 5: MEASURE AND ARTICULATE THE ORGANIZATION'S IMPACT

Goal 5 Background

Dance/USA will ensure scarce resources are supporting the programs with the most impact and best alignment with strategic goals. Dance/USA will consider phasing out programs that generate low impact and are unprofitable.

Action Steps, Goal 5:

- Develop a program assessment tool to assist staff and Board in making decisions on programs. Such a tool might consider factors such as mission, vision, and value alignment; profitability; funding potential; capacity to implement; and evaluation of impact.
- Dance/USA will expand upon its current program evaluation efforts and utilize evaluation findings more consistently to illustrate the impact of Dance/USA's activities.

Outcome, Goal 5: Dance/USA supports a well-connected national dance field, where knowledge and resources are available and shared. With Dance/USA's leadership, the dance field is responsive to current demographic, economic, and participation realities. Dance/USA's revenue mix includes an increased percentage of earned revenues.

GOAL 6: UTILIZE TECHNOLOGY TO IMPROVE OPERATIONAL EFFICIENCY, MAXIMIZE PRIOR TECHNOLOGY INVESTMENTS, AND MODERNIZE ONLINE PRESENCE.

Goal 6 Background

Dance/USA will utilize as much automation as possible, leverage cloud technologies to reduce cost of ownership, and implement a common internal toolset for managing projects and team collaboration.

Action Steps, Goal 6:

- Assess current operations and programs and identify, fund, and implement technologies that will increase operational efficiency and streamline internal and external communications.
- Evaluate current technology investments and identify and leverage more of current investments to support the organization's operations and services.
- Modernize the organization's virtual presence through a website re-design and refreshed social media strategies.

Outcome, Goal 6: Dance/USA operates with technology as a priority. Through technology, the organization is efficient in its work and effective in its communications and constituent engagement. The organization has a dynamic and current online presence.

PHASED IMPLEMENTATION

The planning consultants observed that Dance/USA had several immediate action steps to focus on over the next 18 months. Therefore, the plan will be implemented in a phased-in, iterative approach.

PHASE 1: 18 Months (Second half of 2018; all of 2019) will focus on connecting with and listening to dance artists and administrators across the United States; a refreshed membership value proposition; technology investments; and an acquisition of skills and knowledge to bolster the staff and Board's ability to reach its vision.

PHASE 2: 24 Months (2020, 2021) will see the decommissioning of select programs; revision of other select programs; website redesign and launch; additional hypothesis testing; and the completion of the initial strategic transformation.

STRATEGIC PLANNING COMMITTEE

APPOINTED BY THE DANCE/ USA BOARD

Dance/USA's Strategic Planning Committee (which also serves as its Executive Committee), consisted of dance artists and administrators working across the country, in small and large dance organizations, in various job positions, with a variety of skill sets. The Committee was also diverse in terms of age, gender, race, ethnicity, ability, and experience in the field.

Strategic Planning Committee Members 2017-2018	
<p>Michelle Ramos Board Chair, Dance/USA Executive Director, Alternate Roots New Orleans, LA</p>	<p>Thaddeus Davis Artistic Director, Wideman/Davis Dance Professor, University of South Carolina - Columbia Columbia, SC</p>
<p>Arthur Espinoza, Jr. Vice Chair, Dance/USA Arts Management Consultant Washington, DC</p>	<p>Stanford Makishi Vice President of Programming, New York City Center New York, NY</p>
<p>Doug Singleton Past Chair, Dance/USA Executive Director, Charlotte Ballet Charlotte, NC</p>	<p>Kristopher McDowell Founder & Consultant, Asia Pacific Projects for KMP Artists (U.S.) Programming Strategic & Commercial, Illawarra Performing Arts Centre and Wollongong Town Hall Australia & Austin, TX</p>
<p>Robert Dorf Treasurer, Dance/USA Consultant New York, NY</p>	<p>Malik Robinson Executive Director, Cleo Parker Robinson Dance Denver, CO</p>
<p>Nancy Kadel Secretary, Dance/USA Orthopedic Surgeon Co-Chair, Dance/USA Task Force on Dancer Health Bend, OR</p>	<p>Cookie Ruiz Executive Director, Ballet Austin Austin, TX</p>
<p>Amy Fitterer Executive Director, Dance/USA Washington, DC</p>	<p>Denise Saunders Thompson President / Chief Executive Officer, International Association of Blacks in Dance Washington, DC</p>
<p>Kim Ondreck Carim Founder and Principal, Strategy:Next Former CFO, San Francisco Ballet Oakland, CA</p>	<p>Mary Verdi Fletcher Founder & Artistic Director, Dancing Wheels Company and School Cleveland, OH</p>
<p>C.C. Conner Managing Director Emeritus, Houston Ballet Houston, TX</p>	<p>Sixto Wagan Director, Art and Social Engagement, University of Houston Houston, TX</p>