



THE FUNDAMENTALS OF STRATEGIC PLANNING

The Magic House[®]

St. Louis Children's Museum

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NISA[®]
CHARITABLE FUND

St. Louis
PublicRadio
90.7 KWMU

 **GLXi**
GLOBAL LEARNING EXCHANGE


Washington
University
in St. Louis

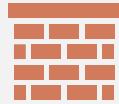
**The Magic
House**[®]
St. Louis Children's Museum

SAINT  LOUIS
**FASHION
FUND**

Our Journey Today



What is Strategic Planning?



6 Key Building Blocks



Strategic Breakouts



Case Study: The Magic House 3-Year
Strategic Plan



What is
Strategic
Planning?

What is Strategic Planning

- Strategic planning is the ongoing organizational process of using available knowledge to document a business's *intended direction*.
- *Prioritizes efforts*, effectively allocate resources, *align* shareholders and employees on the organization's goals, and ensure those *goals are backed by data* and sound reasoning.

- Wharton Business School



The Components

- Defined Time Horizon
- Mission / Vision / Purpose
- Goals
- Strategies
- Financial Projections



STRATEGIC PLAN BENEFITS

Consider it an opportunity to INSPIRE:

- Knowing your stakeholders deeply
- Reinforcing your values that define your organization broadly
- Understanding your unique strengths and how to best leverage them
- Engaging others in your mission and community impact of your organization
- Having a focused, actionable and motivating and trackable plan
- Knowing how you intend to make a greater impact in your community

6 Key Building Blocks to a Powerful Strategic Plan



Key Stakeholders

*Who do you serve?
What are their needs?*



SWOT

*Relative to your peer
group and other like
options?*



Your Brand

*What are your brand's
strengths and distinctive
attributes?*



Values "HOW"

*What are the norms by
which your organization
operates?*



Mission "WHAT"

Purpose "WHY"

*What do you want to
accomplish and WHY?*

Diversity, Equity and Inclusion



Key Stakeholder & Insight Identification

Who are the key stakeholders for your organization?

- Whose lives are you trying to enhance?
- Who are the critical partners in helping you make that happen?
- What are their underlying needs, wants and motivations that you will uniquely serve?

Needs Assessment Tools

WHY CONDUCT A NEEDS ASSESSMENT?

A needs assessment is the process of collecting information about expressed or implied needs. You can try and figure these out on your own, but the best way is to seek feedback from all parties involved.

BRAINSTORMING


 Define the key issue(s) & player(s)
List of some of today's biggest issues → bit.ly/S2tAxd

 Map community resources
@HandsOnNetwork's worksheet → bit.ly/Pw8WqW

 Brainstorm project ideas
Generate as many ideas possible (don't debate...yet)

 Evaluate and prioritize ideas
Based on needs of community and collective interest

#1 Select and focus on top idea
You may want to consider a 2nd if multiple parties

 More brainstorming resources
List of brainstorming games → <http://bit.ly/SYLDew>

CONDUCT A SURVEY

 Ask what greatest concerns are
Open-ended. Use a diverse or representative sample


 Ask them to rank a list of problems
This gets difficult to do if more than 5 items listed


 Guide to creating smart surveys
View SurveyMonkey's guide → <http://bit.ly/PDCn99>

60-MINUTE SEARCH

HOLD A COMMUNITY FORUM

 Ask people to voice concerns
People close to the issues should be included


 Write them down on whiteboard
Also consider an anonymous method for shy people.

 Give each person 3-5 votes
These can be check marks, tallies, or stickers.

 Everyone places votes next to issues
Will you let them use more than 1 vote on an issue?

 Select top 5 issues & revote
Everyone gets 2-3 more votes.

 Record results
Take pictures and tally results for future reference


 Caution: Be representative
If you are not, concerns of majority may dominate


OTHER IDEAS

 Ask your legislators
They should be aware of the greatest concerns

 Research what others are doing
What are others trying to do. How are they doing it?

 Compare to favorite city
What is your favorite city? How do you like it?

 Three wishes for the community
What would they want to see change?

 Watch/read local news
What stories are being reported?

CREATING A VOICE

[Community Needs Assessment 2020 \(helpingpeople.org\)](http://helpingpeople.org)

[Needs Assessment Ideas \(Free Download\) - Top Nonprofits](#)



SWOT

- Strengths:
What do we do best?
- Weaknesses:
What could we improve?
- Opportunities:
How to turn our strengths into new opportunities?
- Threats:
What obstacles do we face?



“Differentiate in a sea
of other well-
meaning nonprofit
organizations”

Your Brand

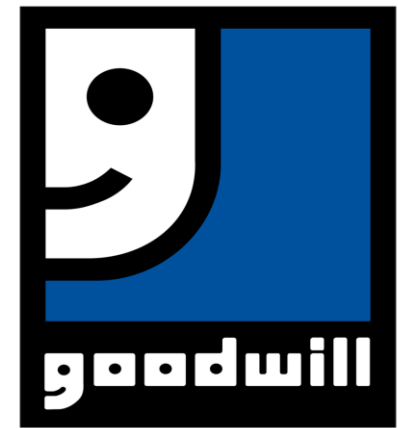


What is a brand?

- Management of the psychological associations held in the minds of all your stakeholders about your organization
- A promise that conveys who you are, what you do and why that matters
- How are perceptions formed? Through experiences with your organization's:
 - Products & Services
 - Employees, Volunteers, Board
 - Organizational Values
 - Communications
 - “Energy” around your Cause



Save the Children®



WWF®



Powerful Nonprofit Brands

Why are Brands Important?

- In a sea of sameness, brands differentiate
- Mental shortcut
- Convey credibility
- Form emotional connection with your mission
- Build relationships with stakeholders
- Provide organizational clarity & cohesion
- Generate internal and external alignment

“A strong brand helps bring credibility and trust to a project quicker, and acts as a catalyst for people to come to the table.” – Former Communications Director at Rockefeller Foundation

Key Trends
making
nonprofit
branding
more
important

- Realization that “you have a brand whether you like it or not. Really the only choice you have is to actively shape and manage it.”
- Thanks to Social Media, all stakeholders have a megaphone, they are speaking on your behalf anyway
- Expectation for greater engagement, 2-way dialogue
- # of Nonprofits is Large and Growing
 - Nationally 1.54MM nonprofits, up 60K or 4.5% over past 10 years (2016, Urban Institute)
 - Missouri 32K nonprofits
 - St. Louis has 16K nonprofits, up 3.5K over past 10 years
- Greater emphasis on partnerships and collaborations across nonprofits, for profit and government



Distinctive Key Brand Equities & Positioning

What combination of attributes make you distinctive vs. peer nonprofits?

- The ingredients that comprise your “special sauce”
- Equities must be nurtured and strengthened. Require investment!

Ultimately, helps define :

What distinctive “space” you want to occupy in your field? (Brand Position)



The Magic House Brand Manifesto

First and foremost we **respect** children. We believe every child is a **curious**, self-directed learner with an intrinsic drive to **investigate** and **explore**, who deserves to be surrounded by **creative** and **interactive environments** filled with **beauty, wonder, joy** and **MAGIC**.

We see it as our responsibility to **protect the magic of childhood** by providing a **safe**, wholesome and **positive** place for purposeful **play** and **hands-on learning** where **friends** are made and **families** connect.

We believe that **childhood** should be **celebrated**, with birthday parties, **special events, inspiring programs**, and engaging **field trips** – experiences that create enduring **lifelong memories**.

Finally, we are an **inclusive organization** committed to creating opportunities for **all children** to feel welcome and valued. It is therefore **our responsibility** to ensure that **The Magic House's** unique brand of **learning experiences** extends **beyond our walls** into the **community** reaching children in their **schools, libraries, hospitals** and more.





Break Out #1 Your Brand



Core Values – the “How”

- Core values are norms that rarely change.
- The “how” by which your organization conducts its daily and long-term operations.
- Imbues the beliefs that the organization stands for and is passionate about.
- Single words can be used, but an explanatory sentence should be attached so it is clear to others your intended interpretation.

WWF Brand Values Example: KODE



K – Knowledgeable

Let's show that we understand the issues, and speak with a clear, intelligent voice.

O – Optimistic

We're all about finding solutions to some of the planet's greatest challenges. Tell people about what we're doing to change the world.

D – Determined

Let's stress the urgency of our work by showing the challenges we're tackling head-on. We don't need to scaremonger, but we do need to inspire people into action.

E – Engaging

Everything we say has to be relevant and inspiring to our audience. Let's make every message speak to as many people as we can, and convince them they need to get involved.



Your DEI Statement

What does DEI mean to your organization? In your own words.

Why is important to your mission and values? What are the specific benefits?

Where are your greatest opportunities to improve?

What areas will you prioritize to further imbed DEI into your organization?

[DEI Commitment Statement Guide \(harvard.edu\)](https://www.harvard.edu/diversity-equity-inclusion/commitment-statement-guide/)

DEI Trends

- “DEI” is becoming corporatized, need to make it authentically your own
- Definition of diversity continues to expand, making inclusiveness more important
- From just training programs to formalized measured actions
- Organizations held to greater accountability through public and employee allies and advocates
- Take listening more seriously
- Evaluate talent more equitably
- Examine remote work as Workforce Diversity and Inclusion

(1) [New Messages! \(i-sight.com\)](https://www.i-sight.com)

(2) [Ways diversity and inclusion will change in 2021 \(fastcompany.com\)](https://www.fastcompany.com)



78% OF
EMPLOYEES

WANT THEIR
EMPLOYER TO
PRIORITIZE DEI



Vision / Mission / Purpose

- Vision:
Desired FUTURE state
- Mission:
WHAT you do
Moves you toward
vision
- Purpose:
WHY you do it

Mission

What we do

Operating a business

Strategic

Inspirational

Creates "buy-in"

Provides focus

Building a company

Laying bricks

Parking cars

Purpose

Why we do it

Sharing a dream

Cultural

Aspirational (True North)

Instills "ownership"

Fuels passion

Building a community

Building cathedrals

Creating happiness



- Culmination of insights on stakeholders, brand strengths, distinctive attributes and core values
- Inspirational and emotionally motivating North Star for your organization
- It is not a campaign slogan, but genuinely and succinctly answers the question:
 - How will your organization change the world for the better?
 - WHY do you exist?

Why do each of you get
up every day and go
above and beyond for
your organization?



Break Out #2 Your Purpose

6 Key Building Blocks to a Powerful Strategic Plan



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Diversity, Equity and Inclusion

Planning for the Long Game: The Fundamentals of Strategic Planning



Board Governance Structure at The Magic House

Board Committees align with Staff Functions and Plan Goals

COMMITTEE	STAFF LIASON
Executive/Strategic Planning	CEO
Education	Director of Education
Facility	Director of Facilities
Development	Director of Development
Finance	CFO
Human Resources	Director of HR
Nominating	CEO
Marketing	Director of Marketing
Technology	CFO

Strategic Planning Process Timeline



The Magic House[®] 2022-2025 GUIDING PRINCIPLES

St. Louis Children's Museum

MISSION

The Magic House will engage all children with hands-on learning and play experiences that spark imagination, pique curiosity, enhance creativity and develop problem-solving skills within a place of beauty, wonder, joy and magic.

VISION

As the premier children's museum, The Magic House will be:

- A leader locally, regionally and nationally in **advocating for play and hands-on learning experiences.**
- **Synonymous with excellence.** Quality exhibits and creative programs, based on sound knowledge of child development, will be at the core of the organization's mission.
- **Accessible to children of all abilities and backgrounds** in the St. Louis region, both at the museum and in the community.
- **A resource for the adults** most important in the lives of children – their parents, teachers and caregivers.
- As an inclusive organization where **childhood is protected, respected and celebrated.**

DIVERSITY, EQUITY AND INCLUSION

The Magic House embraces diversity, equity, and inclusion as essential to our mission. We value and support the uniqueness of each member of our community.

OUR GUIDING PRACTICES

- Foster an environment where all children and families are **welcome, accepted and valued** for their unique interests, abilities and backgrounds.
- Recruit, retain, and value volunteers, staff, and board members who **represent the diversity of our community.**
- Strengthen children's abilities to create and problem-solve together, through play, providing transformational experiences to **expand empathy and cultural awareness.**
- Create programs, facilities, exhibits, and partnerships that **represent and engage diverse voices and experiences.**

KEY GOALS

Playful Learning As Our Foundation

Serve as a vital resource by providing and advocating for play and developmentally appropriate hands-on learning experiences for children, families and educators that meet community needs.

Access For All

Regardless of background, ability or need, provide access to all children, families and schools, particularly those in our region's underserved areas.

Community Impact

Expand our impact, broaden our reach and increase community engagement through key strategic partnerships.

Facilities Excellence

Evaluate and invest in The Magic House's exhibits, buildings and grounds to best serve our visitors and maintain our distinction as a top-tier children's museum.

SUPPORTING GOALS

Financial Sustainability

Develop and implement a three-year financial plan to support our mission and enhance the Museum's future.

Community Support

Increase contributed income to meet operating needs and to provide "Access for All" while also seeking funds for capital or endowed projects as they arise.

Quality Team

Attract, train, support and retain talented and dedicated staff, volunteers and Board members.

Brand Awareness

Build greater awareness of our brand and mission locally, regionally and nationally.

Innovative Technology

Evaluate and implement innovative technology to enhance the visitor experience and improve the operation of the Museum.

Brand Manifesto



The Magic House Strategic Plan

The Magic House
St. Louis Children's Museum

2022-2025 STRATEGIC PLAN

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The Magic House
St. Louis Children's Museum

2022-2025 STRATEGIC PLAN

Key Goals and Strategies

1. Serve as a vital resource by providing and advocating for play and developmentally appropriate hands-on learning experiences for children, families and educators that meet community needs.
Responsibility: Education Advisory Committee

- Be a thought leader and advocate for the importance of play.
- Post-pandemic, re-engage with area schools, particularly in under-resourced areas.
- Create programming to support the families with 1-and-2-year-olds visiting The Magic House.
- Use 21st Century Skills and Themes, as delineated by the Institute of Museum and Library Services, as the framework for exhibits and educational programs.

Use strategies developed during the pandemic to broaden the Museum's reach through virtual field trip programs and outdoor experiences.


Provide innovative STEAM-based exhibits and experiences to encourage interest in STEAM learning and careers.

Act as a resource in assisting schools with post-COVID learning gaps.

Develop and implement Pre-K developmentally appropriate, playful learning curriculum.

Skills – Creativity, Collaboration, Problem Solving, Scientific and Numerical Literacy and Basic Literacy.

Themes – Global Awareness, Financial Literacy, Civic Literacy, Health Literacy and Environmental Literacy.



The Magic House
St. Louis Children's Museum

2022-2025 STRATEGIC PLAN

Supporting Goals and Strategies

Develop and implement a three-year financial plan to support our mission and enhance the Museum's future. *Responsibility: Finance Committee*

- Create a three-year budget projection based on pre-pandemic earned income sources.
- Regularly analyze financial, attendance and program data to inform decision making.
- Develop and then annually review a short-term investment policy to keep current with market trends.
- Develop and maintain a budget contingency plan for use if circumstances change.
- Utilize an Investment Committee to oversee the endowment and to review cash reserve fund investments.
- Annually review our risk assessment document for potential new threats.
- Review all financial policies on a biannual basis.

Use contributed income to meet operating needs and to provide "Access for All" while also seeking funds for capital or endowed projects as they arise. *Responsibility: Development Committee*

- Expand donor-engagement strategies to increase donor retention and donor gifts.
- Put more emphasis on communicating our "Access for All" efforts with our donors and general community.
- Secure 100% Board participation in annual support, with a minimum personal gift of \$1,500 from each Board member and a "give or get" responsibility of \$10,000.
- Utilize our membership program as an important pipeline for new donors.

Develop a diverse fundraising portfolio that includes individuals, major donors, foundations, corporations, planned gifts, special events and community crowdfunding.

Establish a list of funding opportunities to ensure we are seeking identified capital or program opportunities.

Secure 100% more (specific amount to be determined in budget when it is finalized) in annual operating income each year.

Strategic Planning Scorecard

Legend **Accomplished** **On Track** **Behind** **Area of Concern** **Ongoing** **Upcoming**

Legend:

Accomplished	Strategy or goal has been completed and/or implemented, no further work is needed to complete.
On Track	Strategy or goal is in process and currently on pace to be completed as planned.
Behind Schedule	Strategy or goal is behind schedule, meaning that work has begun but it will not meet the schedule planned.
Area of Concern	Strategy or goal is at risk for completion, the narration section for this goal should provide additional details into the area of concern.
Ongoing	Strategy or goal is on track, but is an ongoing without a set deadline/goal date of completion.
Upcoming	Strategy or goal has not yet begun to be initiated, by design.

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