



Strategic Plan

2011-2014

Approved June 20th, 2011

Table of Contents

Pg. 2	Table of Contents
Pg. 3	Introduction by the President of the Board of Directors
Pg. 4	Mission, Vision and Guiding Principles
Pg. 5	Summary of Strategies
Pg. 6-10	Strategic Priorities, Goals and Objectives
Pg. 11-12	Timeline
Pg. 13-14	Organizational History
Pg. 15	Summary of Survey Results
Pg. 16	Summary of Stakeholder Conversations
Pg. 16	Summary of Staff and Board SWOT Analysis
Pg. 17-18	Summary of the Planning Process and People Involved

Introduction by The President of the Board

The beginning of 2011 is the ideal time for Theatre Ontario to undertake a Strategic Review of itself and its operations. We are about to embark on our 40th year of operations, a milestone which naturally encourages a look back and a critical assessment of the way ahead. In addition, we have been advised that our current Executive Director plans to retire near the end of the year. For us, the right process was to determine where we wanted to go, before we started to look for someone to take us there. And, as if we needed more incentive, our applications to our government funding bodies, The Ontario Arts Council and Toronto Arts Council, in March 2012 will be for another three-year Operational Grant.

Most importantly, the Board and staff agreed after much consideration that now was the time to revisit first principles and re-evaluate Theatre Ontario's role in our constantly changing and challenging environment. We had identified a number of weaknesses and threats that if left unaddressed could endanger the long-term viability of Theatre Ontario. We needed to communicate with our members, take a good look at our organization, study our environment and determine the best way forward.

We believe this plan takes a proactive approach to addressing our challenges while supporting Theatre Ontario's unique vision and mandate. This plan seeks to build on our strengths, deepen our engagement with our stakeholders and challenge us to push outside our comfort zone to deliver the best to our constituents.

Our strategies for success involve recruiting, rewarding and retaining the best people for the job (Board, staff and volunteers), constantly reviewing and improving our offerings, increasing our profile among our constituents, and getting creative about where and how we find the money to do all of this.

You won't find any dramatic rewrites of our mandate or sweeping programmatic changes in this document; however, this is an ambitious plan that will require great commitment from our staff, Board and members to achieve. I look forward to participating in the organization's advancement in the execution of this strategic plan.

I would like to thank the planning committee for their thoughtful work on this project, particularly Chris Scholey who chaired the committee and served as interim Board Chair while I took a brief personal hiatus. I also appreciate the contributions of the Board, staff, members, and friends within the theatre community who participated in this project through surveys, meetings, and consultations: their input became the foundation of the plan. Finally, I would like to thank Executive Director John Goddard and Plan Facilitator Kaija Corlazzoli for guiding this process with diligence and care.

Sincerely,

Julianne Snepsts, President – Board of Directors

Theatre Ontario's Mission

Theatre Ontario develops and supports theatre practitioners across the province, by providing resources, networking, training and advocacy.

Theatre Ontario's Vision

Theatre throughout Ontario will be consistently excellent, accessible and respected.

Theatre Ontario's Guiding Principles

Theatre Ontario believes that the art form known as theatre is most essential to society because, through collaboration, it speaks to the human condition and celebrates the human spirit.

Theatre Ontario is guided by the fact that theatre in our province encompasses a vast continuum of diversities, and these diversities (of geography, of practice, of culture etc.) are equally valid and integral to Ontario society.

Theatre Ontario believes that professional theatre practitioners are skilled and innovative contributors to our social and economic fabric, and their pursuit of a career in this field should be respected, valued and encouraged.

Theatre Ontario believes that community theatre enriches the lives of its practitioners and is essential to vibrant and healthy communities across the province.

Theatre Ontario believes that all segments of the theatre continuum are interconnected and mutually dependent.

Theatre Ontario has the capacity and expertise to serve both the professional and community theatres and be the catalyst for their interconnectedness and mutual dependence.

Summary of Theatre Ontario Strategies for 2011 to 2014

- 1) Provide relevant programs to meet the needs of our constituents.

- 2) Raise the profile of Theatre Ontario so that our leadership is more widely recognized.

- 3) Amend our business model so we generate more revenue from a wider variety of sources.

- 4) Strengthen governance so the board more effectively supports Theatre Ontario's mission.

- 5) Ensure the required human resources are available to achieve our strategic planning goals.

Theatre Ontario's Core Strategic Priorities

Strategy #1: Provide relevant programs and services to meet the needs of our constituents.

Background: Our stakeholder survey reinforced that we provide an impressive and long list of services to our members. In an effort to be everything to everyone over the years, we have ended up with some underused and undervalued programs, a number of competing priorities as well as some programs that are overvalued.

While we are recognized as a provider of first-class training for community theatre members, and for excellent opportunities for emerging professionals, we have been frustrated in our attempts to provide training to youth (i.e. teenagers) or technical/non-performance courses. We need to explore delivery methods that reach the intended audience at a reasonable price, without sacrificing quality.

Goal: Raise participation in Theatre Ontario programs and services.

Long-Term Objectives:

- a) Conduct a full review of all programs to ensure alignment with guiding principles, mission and vision by November 1, 2011.
- b) Continually explore opportunities to expand programs in locations across the province.
- c) Create a process for annual program review and a method for evaluating new and existing programs to ensure ongoing alignment with guiding principles, mission and vision by November 1, 2012.
- d) Explore, on an ongoing basis, innovative programs and service delivery models that will add value to membership, enhance existing services and solve current challenges around training.

Strategy #2: Raise the profile of Theatre Ontario so that our leadership is more widely recognized.

Background: Our stakeholder survey told us that we need to be better recognized among theatre practitioners and potential members. The majority of our current members believe that our role is to “provide information, develop resources and build community”. And yet many of our former members have ceased their support because they no longer required a specific service or were unaware of our range of services. There is a disconnect between our perception as supporting a community at large, and the public perception as satisfying specific professional development objectives.

We have also been encouraged from a number of quarters to become a voice for Arts Advocacy in Ontario. This is an activity in which Theatre Ontario has taken a leadership role in the past and, while we did lead the PASO (Provincial Arts Service Organizations) *Artselects 07* Campaign for the last provincial election, our involvement recently has been small to negligible. We need to assess what impact we can have within our resources and where our involvement is most needed. Our advocacy needs to address three things: Our involvement in the political arena, our support for our members’ involvement, and representing our members in the non-political arena (i.e. relationships among artists and copyright, compliance with and impact of government regulations).

Goal: Define and disseminate a clear brand for Theatre Ontario

Long-Term Objectives:

- a) Develop a Communications strategy that develops and articulates the Theatre Ontario brand and that focuses key messages for our various stakeholders by July 1, 2012.
- b) Create a plan for taking advantage of our 40th anniversary by July 1, 2011.

Goal: Define what advocacy means to Theatre Ontario and create a plan to address it.

- a) Determine the appropriate level of participation by Theatre Ontario in existing advocacy activities (example: PASO activities) surrounding the 2011 Provincial Election by August 1, 2011.
- b) Create an Advocacy action plan addressing the ongoing and varied advocacy needs of constituents by July 1, 2012.

Strategy #3: Amend our business model so we generate more revenue from a wider variety of sources.

Background: An analysis of the last forty years of Theatre Ontario's financial statements shows that we were founded, and for many years sustained, by substantial financing from the provincial government. Up until 1995 government grants constituted over 50% of our annual revenue. Since then, government operational funding has dropped and has not and will not be replaced. The result has been a decline in the level of service we provide. To continue to reduce service to match government funding would result in a suicidal downward spiral.

2010 was the third highest Fundraising achievement in our history and we have been working to raise money from other sources. But our donors tell us, through our survey, that we still aren't very good at attracting and engaging them. And we need more of them in order to accomplish the objectives of this Strategic Plan.

Goal: Expand our capacity by generating increased revenue from a diversity of private sources.

Long-Term Objectives:

- a) Examine all operations and identify, by January 1, 2012, any activities for which sponsorship can be acquired, such as Showcase and Festival.
- b) Generate a solicitation package and target potential corporate and foundation partners by April 1, 2012.
- c) Create an annual Fundraising event which will generate revenue and increase profile by July 1, 2012.
- d) Increase the number of individual donors and average donation incrementally each year over the life of the plan.

Goal: Increase Individual and group membership

Long-Term Objective:

- a) Analyze the membership offerings and fees to determine the value of membership and potential for greater value, as part of the programs review in November 2011.
- b) Increase the membership revenue incrementally over the life of this plan.
- c) Design and implement a membership retention plan that includes opportunities to interact with members in their communities by January 1, 2012.

Strategy #4: Strengthen governance so the board more effectively supports Theatre Ontario's mission.

Background: We have not consistently provided our Board of Directors with the information or the support it needs to do its job. As a result, our current board is not well enough engaged in the operations or well enough utilized for the strengths it could bring to the organization. The organization needs a board that combines its policy strengths with integrated participation in Theatre Ontario's activities.

Goal: Board members who understand and own their roles and responsibilities.

Long-Term Objectives:

- a) Create a Board Director Position Description defining roles, responsibilities and expectations by October 1, 2011.
- b) Create a Board Manual and Board Orientation procedure by April 1, 2012.
- c) Create and implement a Board Director self evaluation procedure by January 1, 2012.
- d) Redefine Board Committees and Juries to align with strategic priorities in this plan by January 1, 2012.
- e) Ensure that each Board Committee and Jury has non-Board members representation. Ongoing.
- f) Implement a Board recruitment operational plan by January 1, 2012.

Strategy #5: Ensure the required human resources are available to achieve our strategic planning goals.

Background: Over the past decade, Theatre Ontario has fallen behind in granting market compensation to its employees at every level, and, because of financial restrictions, has a substantially reduced staff. Theatre Ontario has, in the past, responded by reducing the number and quality of services and programs. But that is a downward spiral. We need to maintain sufficient administrative and program staff and volunteers - and compensate staff properly in order to provide our membership with what they need and expect from the organization.

Goal: Appropriate compensation for staff and distribution of workload

Long-Term Objectives:

- a) Commence an Executive Director Search which is aligned with the strategic priorities in this plan, to identify and engage a new Executive Director by September 1, 2011.
- b) Assess and change, where necessary, the position descriptions and organization chart by January 1, 2012.
- c) Conduct a benchmarking activity to determine appropriate wage and benefit compensation for all employees by April 1, 2012.
- d) Implement appropriate correction to personnel compensation by January 1, 2013.

Timeline

The deadlines which appear in the following Strategic Priorities are intended to convey a sense of the order in which items are to be accomplished, an opportunity to measure the achievements, as well as a sense of priority. It is understood that the deadline may change when a committee examines in detail the individual tasks. Each and every one of the Strategic Priorities is to be accomplished during the duration of this plan (three years) but altering an individual deadline is an option available if necessary.

Date:	Objective Deadline:
July, 2011	- Create a plan for taking advantage of our 40th anniversary
August, 2011	- Determine the appropriate level of participation by Theatre Ontario in existing advocacy activities (example: PASO activities) surrounding the 2011 Provincial Election
September, 2011	- Complete the Executive Director Search which is aligned with the strategic priorities in this plan, to identify and engage a new Executive Director
October, 2011	- Create a Board Director Position Description, defining roles, responsibilities and expectations
November, 2011	-Conduct a full review of all programs to ensure alignment with guiding principles, mission and vision -Analyze the membership offerings and fees to determine the value of membership and potential for greater value, as part of the programs review
March, 2012	- Examine all operations and identify any activities for which sponsorship can be acquired, such as Showcase and Festival. - Design and implement a membership retention plan that includes opportunities to interact with members in their communities - Create and implement a Board Director evaluation procedure - Redefine Board Committees and Juries to align with strategic priorities in this plan - Implement a Board recruitment operational plan - Assess and change, where necessary, the position descriptions and organization chart

Date:	Objective Deadline:
May 2012	<ul style="list-style-type: none"> - Create a Board Manual and Board Orientation procedure - Conduct a benchmarking activity to determine appropriate wage and benefit compensation for all employees - Generate a solicitation package and target potential corporate and foundation partners.
July 2012	<ul style="list-style-type: none"> - Develop a Communications strategy that develops and articulates the Theatre Ontario brand and that focuses key messages for our various stakeholders - Create an Advocacy action plan - Create an annual Fundraising event which will generate revenue and increase profile.
November 2012	<ul style="list-style-type: none"> - Create a process for annual program review and a method for evaluating new and existing programs to ensure ongoing alignment with guiding principles, mission and vision.
January 2013	<ul style="list-style-type: none"> - Implement appropriate correction to personnel compensation

History

Theatre Ontario came into existence in 1971, as the result of a meeting of theatre leaders at the Ontario Theatre Conference at Lake Couchiching. From the beginning it was determined that Theatre Ontario would be a unique service organization with membership, programs and services for all the sectors that make up theatre in the province—community, educational, and professional.

Incorporated in August 1971, Theatre Ontario immediately filled the gap created by the demise of the Dominion Drama Festival. Theatre Ontario's first employee was the late Maggie Bassett who pioneered dynamic training programs that benefited the entire province.

Milestones

- 1971
 - Meeting at Geneva Park
 - Founding of Theatre Ontario
 - Maggie Bassett hired as first employee
- 1972
 - Established the [Professional Theatre Training Program](#) (operated until 1999)
 - Established The Talent Bank
 - Launched publication Dialog (predecessor of Theatre Ontario News)
- 1973
 - Launched magazine Scene Changes (published until 1981)
 - Held first [Theatre Ontario Festival](#) (at Brock University in St. Catharine's)
 - Established the [Adult Summer Courses](#) holding a Directing course at Trent University.
- 1977
 - Established the [Youth Theatre Training Program](#)
- 1980
 - Presented Ontario Playwrights Showcase Festival at Hart House Theatre
- 1981
 - Established [Maggie Bassett Award](#)
- 1986
 - Established the [Youth Summer Courses](#)
- 1988
 - Held the first [Shaw Festival Directors Project](#)
 - Established [Victor C. Polley Award](#) with Toronto's St. Lawrence Centre for the Arts
- 1995
 - Showcase - an annual showcase of post-secondary theatre graduates to professional directors, producers, agents and casting directors
- 1997
 - Established [Michael Spence Awards](#)
- 1998
 - Established [Sandra Tulloch Award for Innovation in the Arts](#)
- 2002
 - Compiled and edited an anthology of one-act plays, Seven Short Plays from Theatre Ontario, written by Ontario playwrights and published by Playwrights Canada Press
- 2003
 - Partnered with the Toronto Alliance for the Performing Arts and the Professional Association of Canadian Theatres to share offices and equipment expenses
 - Launched ["To Act In Safety"](#) providing health and safety training for theatres

- 2004 • Launched Biweekly Auditions Email Bulletin (now our [online auditions](#) posting)
- Launched "From Page to Stage" with Playwrights Canada Press, providing over two thousand plays, anthologies and resource books into two hundred high schools
- 2007 • Compiled and edited [Ontario Playwrights](#) a second anthology of one-act plays written by Ontario playwrights and published by Playwrights Canada Press
- 2008 • Partnered with the Council of Drama and Dance Educators to launch [Classroom Stages](#) workshops for teachers
- Launched e-newsletter [Theatre Ontario Presents](#)
- 2010 • Launched [Playwriting Script Assessment](#)
- 2011 • Compiled and edited a third anthology called GRASSROOTS, original plays from Ontario and community theatres, published by Playwrights Canada Press.
- Established The Adjudicators Guild

Key Personnel

Secretary/Administrator, Ontario Theatre Conference, Geneva Park (1971)

Maggie Bassett

Founding Members

Patricia Beharriell, James Costley, Arno Gotthardt, Margaret McCauley, Dusty Miller, Ron Payne, Michael Spence, Cicely Thomson

Presidents of the Board of Directors

Michael Spence, Patricia Beharriell, Elsie Thomson, Ed Procnier, Sandy Black, Don Bouzek, JoAnn McCabe, Gerald Smith, Rod Smith, Ed Minchin, John Storey, Jane Gardner, Colin Taylor, Marian Doucette, Marilyn Lawrie, Janet Irwin, Kay Kanbayashi, Mike MacLean, Richard Poore, Julianne Snepsts (current)

Chairpersons of the Board of Directors (until 1990)

Norman Griesdorf, Paul Eck, John Plank, Dusty Miller, Anne Wilson

Executive Directors

James Costley, Robert Ellison, Gene Maddox, Don Herbertson, Bryan Thomson, Catherine Smalley, Sandra Tulloch, Jane Gardner, Barbara Anderson-Huget, John H. Goddard (current)

Summary of Survey Results

- 1) Respondents were primarily individuals, 55% of whom are between the age of 40-65 and another 24% between the ages of 26-40.
- 2) There is an equal split between the professional and community theatre.
- 3) Approx. 60% of respondents were members, and only 13% non members. Of these the majority were either new members (1-3 years) or long standing members (11years +).
- 4) They remain members for the purposes of networking, idea sharing and connections, because of the online information and because they access specific programs.
- 5) Lapsed members who responded were for the most part recent members and did not renew their membership due to a perceived lack of value for money, they moved out of the province or got busy and forgot.
- 6) Most members believe our role is to provide information, develop resources and build community. We are seen as doing this very well and the most respondents are either very satisfied or satisfied with how we do these things.
- 7) Perception is that Theatre Ontario is most focused on community theatre, then professional, then education, and that we are serving community theatre well as opposed to very well and that professional theatre is split between feeling well serviced and needing improvement.
- 8) The majority of respondents (65%) have never made a donation. But of those who did, said they did so because they either believe in the work that Theatre Ontario is doing or they use the services. The overall response was that we need to better recognize our donors, communicate the need for support and how the money is used.
- 9) In terms of programs, the online resources, publications and courses and events are the most used and considered to be very useful.
- 10) The website and E-newsletters are considered to be the most useful online tool and are for the most part accessed 1 – 2 times per month.
- 11) Feedback on staff and workshop leaders is all very positive.
- 12) There were a couple of negative comments made suggesting that Theatre Ontario is not serving the north well, that training and presence is lacking and that Theatre Ontario serves no purpose.

Summary of Stakeholder Conversations

The following themes emerged from various conversations with stakeholders:

- 1) TO was the first game in town and a lot of the professional companies started around that time. Formed out of a conference of educators, in the heyday of funding and was first and foremost about training and advocacy.
- 2) Need for advocacy at provincial level.
- 3) PTTP & YTTP run very successfully and TO as hub for emerging artists and there is a real demonstrable impact as a result of these programs.
- 4) Providing meaningful information is the most important part of what TO is doing.
- 5) Opportunity to expand training programs to include arts administrators & artists.
- 6) Noted a change happening local vs. provincial as the communities mature and we need to adapt to changes.
- 7) Greatest challenge has always been the loyalty of members, TO should sell itself as involved in issues of importance to the theatre community

Summary of SWOT Analysis

Strengths: Unique provincial mandate, long history, devoted staff and great programs, adaptability, communications

Weaknesses: Difficulty generating new revenue, lacking a clear brand and need for advocacy, board recruitment, perceptions of organization professional/ community dynamic, no bling, need communications plan, members have divided loyalties

Opportunities: Board and ED turnover could bring new blood, service community theatre through training programs, become more relevant through advocacy

Threats: OAC does not fund community theatre; both the professional and community theatres are developing their own savvy and less need for Theatre Ontario, advocacy, if we do not become the voice of theatre in Ontario then someone else will fill this space

Summary of the Planning Process & People Involved

Step #1: Meeting to examine environment (resources, timing, team etc) and plan for success (John Goddard and Kaija Corlazzoli)

Step #2: Meeting to assess strategic issues and set up planning process/ plan to plan (Planning committee)

Step #3: Meetings with various external stakeholders to gain insight into Theatre Ontario's past and present positioning. Review mission, vision, values statements, history and previous/ current strategies (Planning committee with guests Brian Van Norman and Cornelia Persich)

Step #4: Create, circulate and then review extensive survey of all stakeholders. (Survey drafted by the planning committee with input and circulation from Theatre Ontario staff.)

Step #5: Meeting of the board of directors to talk about the process and conduct SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis. (Board of Directors, John Goddard and Kaija Corlazzoli)

Step #6: Meeting of all staff to talk about process and conduct SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis. (Staff)

Step #7: Meeting to analyse and discuss information gathered and plan for retreat. (Planning committee)

Step #8: Planning retreat to assess situation, update mission, vision, guiding principles and then agree on priorities and set future strategies, goals and objectives. (Planning committee with guests Cam Lund, Bill Meaden and Brandon Moore)

Step #9: Write plan (Kaija Corlazzoli, John Goddard and Julianne Snepsts)

Step #10: Meeting to write one year operational plan based on the strategies that came out of the planning process. Circulate the written plan to staff for feedback. (Staff)

Step #11: Meeting to review, discuss and update written report. (Planning Committee)

Step #12: Circulate written plan to board of directors and then meet to review and approve.

Core Planning Committee: Kaija Corlazzoli (Facilitator), John Goddard, Michael Grit, Anne Mooney, Julianne Snepsts, Chris Scholey

Planning Committee Invited Guests: Cam Lund, Bill Meaden, Brandon Moore, Cornelia Persich, and Brian Van Norman.

Staff: John Goddard, Tim Chapman, Kaija Corlazzoli, Dennis Johnson, Chris Hackett, Brandon Moore and Cornelia Persich.

Board of Directors

Executive: Julianne Snepsts, President: Anne Mooney, Vice-president; Chris Scholey, Treasurer; Sheena Albanese, Secretary, Cam Lund, Member at Large.

Members: Michael Grit, Patrick Gauthier, John Koensgen, Helen Landry, Debra McLauchlan, Mark Mooney, Angela Rebeiro, Andy Trasuk, Brian Van Norman.