

Foundations for Strategic Growth

Spring 2021
Troutdale

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PPPM 620 Nonprofit Consultancy Capstone

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Acknowledgments

The consultancy team would like to thank the Cascadia Arts Association (CAA) Board of Directors, staff, and volunteers. Without your contribution and passion to grow CAA, this report would not be possible. A special thanks to Marlee Boxler and the City of Troutdale and Megan Banks and the Sustainable City Year Program. In addition, we would like to thank our advisor, Dyana Mason, for her ongoing guidance and support.

This report represents original student work and recommendations prepared by students in the University of Oregon's Sustainable City Year Program for the City of Troutdale. Text and images contained in this report may not be used without permission from the University of Oregon.

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About SCI

The Sustainable Cities Institute (SCI) is an applied think tank focusing on sustainability and cities through applied research, teaching, and community partnerships. We work across disciplines that match the complexity of cities to address sustainability challenges, from regional planning to building design and from enhancing engagement of diverse communities to understanding the impacts on municipal budgets from disruptive technologies and many issues in between.

SCI focuses on sustainability-based research and teaching opportunities through two primary efforts:

1. Our Sustainable City Year Program (SCYP), a massively scaled university-community partnership program that matches the resources of the University with one Oregon community each year to help advance that community's sustainability goals; and

2. Our Urbanism Next Center, which focuses on how autonomous vehicles, e-commerce, and the sharing economy will impact the form and function of cities.

In all cases, we share our expertise and experiences with scholars, policymakers, community leaders, and project partners. We further extend our impact via an annual Expert-in-Residence Program, SCI China visiting scholars program, study abroad course on redesigning cities for people on bicycle, and through our co-leadership of the Educational Partnerships for Innovation in Communities Network (EPIC-N), which is transferring SCYP to universities and communities across the globe. Our work connects student passion, faculty experience, and community needs to produce innovative, tangible solutions for the creation of a sustainable society.

About SCYP

The Sustainable City Year Program (SCYP) is a year-long partnership between SCI and a partner in Oregon, in which students and faculty in courses from across the university collaborate with a public entity on sustainability and livability projects. SCYP faculty and students work in collaboration with staff from the partner agency through a variety of studio projects and service-

learning courses to provide students with real-world projects to investigate. Students bring energy, enthusiasm, and innovative approaches to difficult, persistent problems. SCYP's primary value derives from collaborations that result in on-the-ground impact and expanded conversations for a community ready to transition to a more sustainable and livable future.

About City of Troutdale

Troutdale is a dynamic suburban community in Multnomah County, situated on the eastern edge of the Portland metropolitan region and the western edge of the Columbia River Gorge. Settled in the late 1800s and incorporated in 1907, this “Gateway to the Gorge” is approximately six square miles in size with a population of nearly 17,000 residents. Almost 75% of that population is aged 18-64.

Troutdale’s median household income of \$72,188 exceeds the State of Oregon’s \$59,393. Troutdale’s neighbors include Wood Village and Fairview to the west, Gresham to the south, and unincorporated areas of Multnomah County to the east.

For the first part of the 20th century, the city remained a small village serving area farmers and company workers at nearby industrial facilities. Starting around 1970, Troutdale became a bedroom community in the region, with subdivisions and spurts of multi-family residential housing occurring. In the 1990s, efforts were made to improve the aesthetics of the community’s original core, contributing to an award-winning “Main Street” infill project that helped with placemaking. In the 2010s, the City positioned itself as a jobs center as it worked with stakeholders to transform a large superfund area to one of the region’s most attractive industrial centers – the Troutdale-Reynolds Industrial Park.

The principal transportation link between Troutdale and Portland is Interstate 84. The Union Pacific Railroad main line runs just north of Troutdale’s city center. The Troutdale area is the gateway to the famous Columbia River Gorge Scenic Area and Sandy River recreational areas, and its outdoor pursuits. Troutdale’s appealing and

beautiful natural setting, miles of trails, and parkland and conservation areas draw residents and visitors alike. The City’s pride in place is manifested through its monthly gatherings and annual events, ranging from “First Friday” art walks to the city’s long-standing Summerfest celebration each July. A dedicated art scene and an exciting culinary mix have made Troutdale an enviable destination and underscore the community’s quality of life. Troutdale is home to McMenamins Edgefield, one of Portland’s beloved venues for entertainment and hospitality.

In recent years, Troutdale has developed a robust economic development program. The City’s largest employers are Amazon and FedEx Ground, although the City also has numerous local and regional businesses that highlight unique assets within the area. Troutdale’s recent business-related efforts have focused on the City’s Town Center, where 12 “opportunity sites” have been identified for infill development that respects the small-town feel while offering support to the existing retail environment. The next 20 years promise to be an exciting time for a mature community to protect what’s loved and expand opportunities that contribute to Troutdale’s pride in place.

Course Participants

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Executive Summary

Cascadia Arts Association (CAA) is an exciting new arts nonprofit membership organization located in Troutdale, Oregon. Troutdale, nestled in East Multnomah County, is part of the West Columbia Gorge and uniquely poised to become a robust arts destination. Through various nonprofit, government, and business partnerships, Troutdale is an active, diverse arts community that contributes to the county's community art projects, annual art shows, and educational opportunities. From our findings, CAA has the opportunity to become a key contributor as an arts association to develop Troutdale's arts community.

This report is intended to provide recommendations for best practices in creating and maintaining a sustainable arts organization.



Overview

MISSION

Cascadia Arts Association is a nonprofit organization, established in 2020 in Troutdale, Oregon. The mission of CAA is to enrich communities by providing accessible arts outreach and education, hosting and supporting area arts events, and promoting the visual, performing, and literary arts.

VISION

Cascadia Arts Association's vision is to be one of Oregon's premier art associations and destinations using the natural beauty of the Columbia River Gorge and Mt. Hood as inspiration.

SCOPE OF WORK

We understand the ultimate goal of CAA is not only to enrich communities through the arts but also to develop and maintain a sustainable board and organizational growth plan. At the onset of our project, the main scope of work focused on the development of a five-year strategic plan. However, from further discussions with board members, it became apparent that bolstering their board governance structures was also necessary.

As such, our findings are two-fold. First, we present foundational recommendations for nonprofit board governance that are rooted in best practices and research. Guided by the theory of Nonprofit Lifecycles, we describe how we have identified where CAA is in these phases and offer capacity building strategies. Finally, we provide a framework for a five-year year strategic plan that includes high-level recommendations for the following broad strategic areas: membership growth, fundraising, financial planning, programs and events, and partnerships.

Research Question

Our research for CAA seeks to understand best practices for developing a strategic plan for a newly formed arts organizations. Because CAA is in the early phases of organizational development, they are uniquely positioned to implement a strategic plan that can directly impact their formation and long-term visioning. Further, we understand that nonprofit arts organizations often have organizational structures that merit individualized approaches (Byrnes, 2015).



Research and Process

Susan Kenny Stevens' Nonprofit Lifecycles (2001) is grounded in development theory and identifies common behaviors and challenges of organizations as they transition from one phase of development to another. It is first used as a diagnostic tool to identify which Lifecycle phase an organization is in, providing insight into what characteristics and challenges are to be expected at the current phase. Then, it presents a logical guide for navigating growth into the next phase. This diagnosis is essential for the sustainable development of CAA. "Capacity building programs that don't start with Lifecycle diagnosis run the risk of assuming all organizations are starting from the same place. Worse yet, if they offer one-size solutions as their methods, nonprofits may have to leap-frog over important developmental tasks foundations to capacity building" (Stevens, pg. 50).

THE NONPROFIT LIFECYCLE



Stevens identifies five capacity builders that, when in alignment, can help to elevate organizations from one phase to another:

- Programs
- Management
- Governance
- Financial resources
- Systems

These capacity builders align with CAA's strategic plan focus areas, and they will be used in combination with the characteristics and challenges of CAA's current phase to inform and give context to our recommendations.

Our Lifecycle diagnosis places CAA somewhere in between the first two phases – the idea and the start-up. The idea phase is characterized by the desire to fill a programmatic or cultural gap within a community, and a lack of organizational structure. Some performance outcomes associated with this phase have already been achieved, including securing a tax-exempt status, defining a clear purpose and beneficiaries, and assembling a board of dedicated volunteers. However, our research has identified that in order to move fully into the start-up phase, CAA needs to increase their capacity and further define their governance roles and responsibilities.

The following associated performance outcomes of the start-up phase will serve as guideposts for our research and strategic plan development:

1. Organization has established community demand for its services
2. Services meet client needs and expectations
3. Minimal quality standards have been set; Organization has learned when to say “no” to preserve standards
4. Staff have specific positions and duties and are committed to building a durable organization
5. Basic organizational activities have been routinized and roles clarified
6. Membership has expanded beyond friends of the founders
7. Enough members are committed so that the board has begun to set direction
8. Organization has attracted more than one source of outside funding
9. Organization has shifted resources to development of basic bookkeeping and administrative systems (Stevens, 2002)

Due to the early phase of CAA's development, our strategic plan will focus on broad brushstroke recommendations for the next five years. The plan will emphasize the development of foundational governance structures, and hold financial stability and program development at its core to promote growth and foster organizational sustainability.

Methodology

Research was conducted through a focus group with the board of directors, a collected survey, and a content analysis of similar organizations' strategic planning documents.

The focus group included a SWOT analysis to identify internal and external factors affecting the organization, and sought to gather data on board member roles and responsibilities. Of the seven board members, five attended. One staff member and one volunteer who currently support CAA's fundraising and event logistics also attended. Following the focus group, attendees identified via email year-one and years-two through five goal priorities for the organization.

After conducting this research, board governance framework was identified as an additional area of necessary recommendations.

A nine-question Qualtrics survey aimed to identify community needs, opinions about the current state of the Troutdale arts community, and expectations of CAA. It was distributed to a list of 96 East Multnomah County artists, businesses, and organizations that was provided by CAA board members. Of the 96 emails, 10

bounced and the rest sent successfully to respondents. Respondents were given three weeks to complete the survey, and three follow-up reminder emails were sent during that time.

Finally, we performed an analysis of the strategic planning documents of Lane Arts Council (Eugene, Oregon) and Clackamas County Arts Alliance (Oregon City, Oregon) to identify common goals and themes related to the following focus areas:

1. Vision
2. Mission
3. Partnerships
4. Sustainability
5. Accessibility
6. Diversity
7. Capacity building

These organizations were chosen because they have a similar mission and vision to CAA and operate within similar geographic areas.

Findings

CAA's board has a clear passion for the arts and the Troutdale community

The excitement the CAA board has for its community is palpable. All members of CAA have enthusiasm, creativity, and inspiration. There is a shared eagerness to develop a sustainable organization that not only supports the Troutdale arts community, but does so in a way that exemplifies a premier arts association and East Multnomah County arts hub. For example, during focus group visioning, 100% of all board members who attended indicated that they desire to better connect their community to the arts. This points to overall cohesion and shared passion for Troutdale's arts community, both as a commitment to organizational development and in providing accessible arts opportunities. As such, for a newly formed organization, this provides an opportunity for them to capitalize on these strengths.

CAA's board envisions a sustainable organization

Even though CAA is a relatively new organization, the board is already looking toward the future by passionately describing their vision of CAA becoming a sustainable organization which creates a thriving arts and culture environment in Troutdale. Members of CAA are attentive to the creation of programming and processes which will lead to the expansion and longevity of the organization. Along the same frame, the board is interested in implementing succession planning which will enhance the structure of CAA.

The board desires more straight-forward, clear roles and responsibilities

Current CAA bylaws outline explicit responsibilities for president, treasurer, and secretary. However, even with these defined roles, board members without a designated chair position expressed concern about how to best contribute to the overall board's functioning. As part of a SWOT exercise, the board had the opportunity to identify current weaknesses they saw within their organization. Repeatedly, members acknowledged there were unclear roles, perhaps leading to confusion about how to simultaneously put systems together in the best way. This was further exemplified throughout the content analysis of local arts organizations, indicating that the development of strong leadership is key to strategic planning and sustainable growth. This suggests that if board roles and responsibilities were more clearly defined, the board may be better equipped to carry out their current and future organizational goals.

Current board infrastructure proves difficult to sustain CAA's goals

As a whole, the board has a robust set of professional skills that can contribute to the success of CAA, i.e. finance, fundraising, event management, grant writing, and budgeting. However, not all areas of expertise are currently maximized. One board member, for example, expressed the desire to more intentionally use social media to promote CAA, but the time and coordination necessary to execute and prioritize such tasks has been

challenging. There is an overall sense that though the board has big visions, they simply do not have enough energy and resources to complete their goals. This points to the need to implement capacity building strategies so that the Board can delegate roles, avoid burnout, and maintain momentum.

COVID-19 has stalled CAA's efficiency and visibility

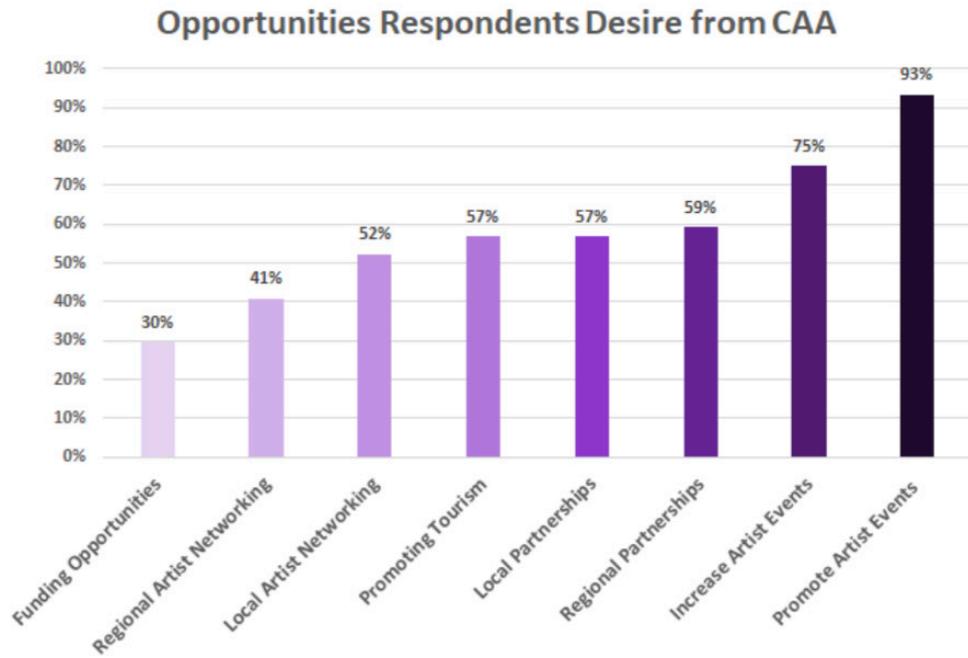
The COVID-19 pandemic has caused significant roadblocks for CAA's development. COVID-19 has changed the way organizations can promote and gather people for programming, and as such has lowered CAA's ability to become visible as a new organization in Troutdale. In particular, it has been impactful in two main areas: internal communications and external engagement. During the SWOT portion of the Board focus group, several board members identified low visibility as an internal weakness and also an external threat. Due to the pandemic, nearly all of CAA's communications and meetings have been facilitated via virtual platforms. Though there has been a gradual transition to in-person (art center location offices), this lack of face-to-face interaction has proved difficult for members to feel connected and engaged with one another and the community.

Due to decreased visibility, there has been a disconnect with the Troutdale community about CAA's overall goals and benefits. In addition, Troutdale residents maintain some sense of fear and hesitancy around attending in-person events due to health concerns, namely CAA's largest event of the year, Fall Festival of the Arts. This further highlights the overall need for CAA to focus on current programs before expanding into new initiatives.

Artists and community members identified clear aspirations for CAA

Through the survey, respondents from East Multnomah County identified clear aspirations surrounding CAA's focus. The top two benefits local artists and community members are hoping CAA will provide are an increase in event opportunities and promotion and marketing of artist exhibitions and events. While ranked lower, networking and funding opportunities are also important aspects respondents are hoping CAA will provide. Figure 1, as seen below, is a visual representation of data gathered from Question 9 in the survey. This question asked, "What do you think Cascadia Arts Association's primary focus should be?" Respondents were given the opportunity to select as many options as they felt applied to CAA's focus.

FIG. 1
Artist and community
members' desires from
CAA



**Fall Festival of the Arts (FFA)
ignites excitement**

The mission of the Fall Festival of the Arts in Historic Troutdale is, “to connect, support, and present the thriving community of artists, studios, workshops, and galleries in our region; and to build awareness of the West Columbia Gorge as a Fine Art destination.” For the last several years, this event has been a cornerstone of the Troutdale arts community and ignites a great deal of excitement from both artists and arts enthusiasts. Survey

data showed that 57% of respondents were most excited about the FFA among the events listed, including an option for the development of something new (Figure 2).

Additionally, during the focus group, several board members stated that they were introduced to CAA because of their participation in FFA. They actively acknowledge the opportunity to leverage connections that have been formed within the community through FFA to catalyze membership, support, and advocacy for the Troutdale arts.

Event Which Most Excites Respondents

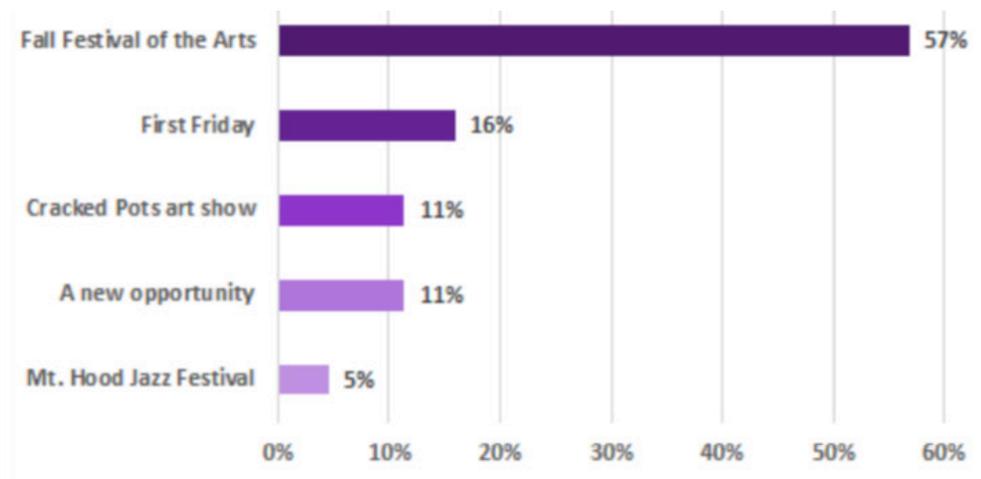


FIG. 2

Events that excite artists and community members

Both CAA and the community desire additional program offerings

While there are several exciting arts events happening in East Multnomah County, the community desires more, and CAA is excited to offer events to them. Data from the focus group with the CAA board of directors identified that they are eager to provide more accessible arts and arts education experiences by expanding their programming. Additionally, survey data shows that Troutdale artists are looking for additional event opportunities as part of their expectations from CAA (Figure 2).

Our analysis of strategic planning documents showed that both LAC and CCAA pointed toward program assessment and evaluation as essential elements of their program expansion and sustainability. This suggests that clearly defined program objectives and assessment plans can aid CAA in their program expansion goals.

CAA has a strong partnership with the City of Troutdale

The City of Troutdale is a key partner for CAA, and shares their goal of establishing Troutdale as an arts destination. Part of this partnership includes providing grant funding and technical support for FFA. CAA also participates in the City's First Friday Art Walk, which was recently reinstated. This partnership is incredibly valuable, and both CAA and City representatives have expressed interest in planning for a continued partnership into the future. Currently, the future of this partnership lacks clear goals, channels of communication, and decision-making processes as the organization continues to evolve.

Cross-promotion and coordination of services is critical for future partnerships

In the SWOT analysis, the board identified an opportunity to enhance the area’s cultural activities and work with various groups within the community. Examples include First Friday Art Walk, the Troutdale Historical Society, and local art galleries. Additionally, CAA has expressed interest in expanding their partnerships to other arts organizations in East Multnomah County, such as the Mount Hood Jazz Festival. Through conversations and the focus group

with the board, two primary goals for these and other partnerships were identified: creating channels of cross-promotion, and ensuring that services are not being duplicated. The content analysis identified the development of collaborative cross-sector partnerships that help situate arts and culture as vital parts of the community as a pillar of both strategic plans. Both strategic plans also emphasized mutually-beneficial partnerships, and supporting or promoting partner organizations. Additionally, survey data showed that artists are looking for promotion of their gallery and exhibitions from CAA.



Recommendations

GOVERNANCE FOUNDATION RECOMMENDATIONS

Introduction to Best Practices

Board governance is the heartbeat of nonprofit organizations. Nonprofit board governance is two-pronged: 1) it ensures the organization is operable and 2) it provides strategic and mission-driven direction (NPQ, 2017). Further, the board oversees financial accuracy, ensures accountability, and monitors organizational performance. A well-functioning board also exemplifies a clear definition of board roles and responsibilities, fosters committee structures, and implements board recruitment processes.

The focus group board meeting and SWOT analysis exercise specifically highlighted the need for CAA to implement a board governance guiding framework. In order for CAA to achieve their short and long-term goals, the board must first be rooted in governance best practices. The following recommendations will provide guidance for the board's ongoing internal growth and development.

Board Retreat

As a first step in formalizing overall board governance practices, we recommend scheduling a board retreat within the next three months. This retreat will serve as a starting point to implement all other board governance recommendations in this section. This can include either a full one-day retreat, either via online platform or in person, if possible, or a two-day retreat. After this year, we recommend CAA holds an annual board retreat to revisit goals and priorities.

We recommend this year's board retreat focuses on two key areas:

- Review and update board job descriptions, as necessary
- Fill out board development matrix

Board retreats are valuable because they allow board members to step away from their daily work and intentionally focus on cohesive team building, goal setting, and visioning (Miller-Millelsen, 2003).

Though the current job descriptions for president, treasurer, and secretary are included in the bylaws, we recommend revisiting these as a collective board to review these roles, analyze if these roles are being fulfilled, and update and adjust accordingly. It is important to ensure that board members understand and fulfill their designated roles and responsibilities. Once complete, we encourage the board to identify their individual areas of expertise, resources, and connections.

During the board retreat, schedule a time to work on a board development matrix. This matrix, exemplified in Appendix B, is a table that provides a detailed way to see how many board members have specific skills, fit varied demographics, and fulfill areas of expertise. This matrix provides a visual representation and step-by-step way to work as a collective in relation to recruiting new members ("The Nonprofit Board Answer Book", 2012).

Board Recruitment

Following the board retreat, we encourage the continued use of the board development matrix to identify gaps in the board and begin the recruitment planning process (BoardSource, n.d.). We recommend recruiting up to five new board members by spring of 2022 to diversify the skillset of the board and expand capacity. This timeline will provide CAA the space to focus on the facilitation of 2021 FFA.

There are numerous ways to recruit, including speaking with personal board member connections, advertising on social media, creating a volunteer page on your website, or advertising using printed materials, which could be distributed at events such as FFA. Whichever route or routes taken, ensure the board is in alignment about the roles being filled and expectations for the recruitment timeline (BoardSource, n.d.). Recruiting new members can bolster capacity, a need identified in our previous findings.

Committee Work and Structure Recommendations

Board committees are an efficient way of leveraging individual board member strengths to support nonprofit operations by concentrating specific skills to work on the projects where they will have the most impact, especially for volunteer-run organizations (Clark, 2020). Standing committees should only be formed for board activities that require ongoing attention. The most common standing board committees are finance, executive, fundraising, and governance (Boardsource, 2019). Generally, it is best practice to have, at minimum, a governance committee and a finance committee.

Recommendations for effective committee work include:

- Establish strong leadership by identifying and mobilizing individual board member strengths
- Clearly define job description, goals, and timelines for the committee's work
- Create an evaluation process for the committee to assess its own work
Have consistent committee meetings and report updates back to the full board
- Recognize that the committee is intended to advise the full board, make recommendations, and carry out specific tasks, rather than make decisions (Boardsource, 2020)

During the early phases of organizational development, we recommend that the board focus on bolstering board capacity through the use of effective standing governance/ recruitment and finance committees. Once roles and responsibilities have been clearly defined, we recommended forming a standing fundraising committee to begin diversifying the organization's revenue sources. Currently, the CAA bylaws list committees for community art events, education, and marketing (pg. 7). While these represent important elements of the organization's overall mission, not everything that is important requires a standing committee. As the organization continues to grow, we recommend establishing ad hoc committees, which are temporary and exist for the duration of a specific project.

The recommendations included in the section above provide the starting point for strategic planning. This graphic provides a visual representation of our

recommendation framework, which begins with these foundations, leads into a growth phase, and results in sustainability.

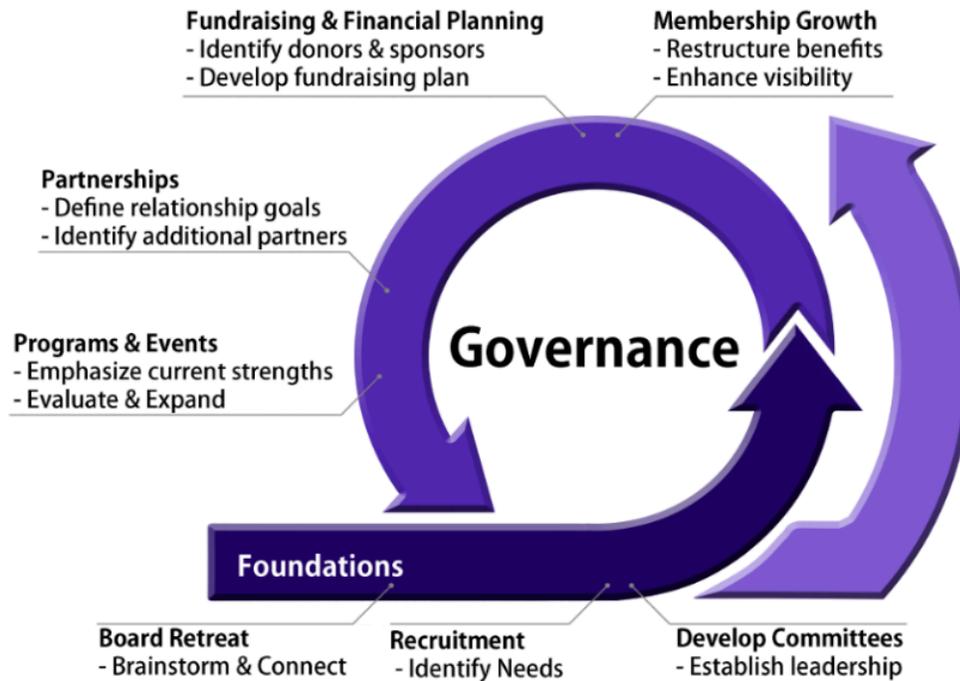


FIG. 3

Building a Sustainable Arts Organization:
Laying the Foundation
for Strategic Growth

Recommendations in the next section relate to CAA's original scope of work and revolve around strong, responsive governance practices. Creating a sustainable arts organization requires an ongoing evaluation process of strategic growth activities to maintain sustainability.

MEMBERSHIP GROWTH RECOMMENDATIONS

Restructure Membership Levels

Within the next six months, we recommend the board restructure membership levels to better define their unique benefits and costs. Each level of membership should list tangible benefits as the incentive for people to become members and the number of listed benefits will increase with each tier of membership. The

goal of each membership level is to create community demand and entice members to renew (Ki & Wang, 2016). Based on survey data, examples of tangible benefits include:

- Promote artist exhibitions and events
- Provide one exhibition a year in the CAA membership gallery
- Host one artist networking event a year to connect local and regional artists
- Administer funding opportunities

We also recommend removing the Business Level and Lifetime Level from the membership levels. More discussion on this recommendation can be found in the fundraising and financial planning section of the recommendations.

Enhance CAA's Visibility

To enhance CAA's visibility within Troutdale we recommend utilizing marketing and promotion efforts. There is an opportunity to capitalize on CAA's most popular event, Fall Festival of the Arts. Create a quarter page flier or postcard that lists the newly revisited membership levels and benefits for distribution. This flier can be handed out throughout the event to enhance CAA's visibility pertaining to membership and relay the message that Fall Festival of the Arts is now fully run by CAA.

We also recommend CAA utilize social media platforms to enhance their visibility by creating social media accounts on Instagram and Twitter which match CAA's social media handle from Facebook. After creating these accounts, link them to the social media links on CAA's website and remove links to social media platforms not currently in use. The media platforms could be used to promote Fall Festival of the Arts, the membership gallery, membership levels and benefits, and promotion of artist events. A promotion of artist events and art in the membership gallery could be some of the membership level benefits.

FUNDRAISING & FINANCIAL PLANNING RECOMMENDATIONS

Identify and Define Sponsorships and Donors

As mentioned in the membership growth section, we recommend CAA remove the Business and Lifetime membership levels. The Business level is more accurately defined as a sponsorship with CAA whereas

the Lifetime level relates to general large-sum donations. We recommend the board revisit the Business and Lifetime levels to discuss what the organization is hoping to gain out of these monetary contributions (Kline, 2016). We also recommend defining what the relationship between CAA and sponsors and donors means to all parties involved (Byrnes, 2003). Finally, outline these decisions on CAA's website by creating separate sponsor and donor pages.

Develop a Fundraising Plan for the Next Year

We recommend developing a fundraising plan for the upcoming year. An example of a fundraising plan Excel file can be viewed in Appendix C with corresponding fundraising activities. Filling in and planning fundraising activities can be done as a scheduled work session for the board.

Decide these items as a board:

- Date of fundraising activity
- The fundraising activity
- Number of hours needed to complete the activity and how many people are needed
- Cost of the activity
- Goal of income from the activity
- Net Income
- Notes

All sections are flexible, and we encourage the board to add sections applicable to CAA, as the sheet and plan is intending to be unique for each organization. This plan will aid CAA in diversifying funding beyond the grant from the City of Troutdale (Kline, 2016).

PROGRAMS & EVENTS RECOMMENDATIONS

1st year: Focus on Established Events & Programs

Currently, Fall Festival of the Arts carries the most momentum and energy amongst the board of directors and within the Troutdale community. We recommend that over the next year, CAA focuses their efforts toward successful execution of FFA. This will help the organization to maximize on its current funding and lay the foundation for future successful events and programs. In doing so, we further recommend that CAA identifies goals for FFA and develop a method to conclude whether or not they were achieved once the festival is concluded.

2-5 years: Evaluate & Expand Events & Programs

Once Fall Festival of the Arts is complete, CAA should be able to identify what they achieved, which goals were met, and how they can expand future programs and events. For years two through five, we recommend CAA continues to assess and track their event outcomes to provide the organization with a benchmark moving forward. This evaluation could include membership interest, total revenue, total participants reached, etc. Once this evaluation is complete, we also recommend the CAA board meets to discuss long-term goals, vision, and funding. The subsequent Partnership Recommendation section can serve as a starting point to identify partners who can support future events and programs.

PARTNERSHIP RECOMMENDATIONS

Clearly Define CAA's Relationship With the City of Troutdale

CAA already has a number of valuable partnerships in place, particularly with the City of Troutdale. In order to effectively capitalize on this partnership, we recommended that CAA and the City more clearly define how they want this relationship to evolve by establishing pipelines of communication for creating structures of strategic collaborative decision-making. For example, discussing strategies for capitalizing on promotional opportunities ahead of time will help to ensure cohesive and consistent branding. Additionally, we recommended that both CAA and the City of Troutdale continuously re-evaluate and communicate the goals for their ongoing partnership, and adjust channels of communication and collaborative structures as necessary.

Form Additional Partnerships

CAA already has a number of other valuable connections with the Troutdale Historical Society, Mount Hood Jazz Festival, and local art galleries. Through our research, we have identified two broad goals of these partnership ventures: 1) to create a culture in which arts organizations in East Multnomah County promote and support each other, and 2) to ensure that services are not being duplicated. To achieve these objectives in current and future partnerships, we recommend the following system:

- Identify potential partner
- Clearly define CAA's intended goals of the partnership
- Discuss goals with partnering organization and come to a mutually beneficial consensus
- Formulate systems to achieve goals

In the event that CAA and a potential partner organization do not find their goals in alignment or mutually beneficial, we recommend that CAA be empowered to forgo the partnership in favor of the mission and determined standards of quality (Nonprofit Lifecycles, 2001).



Conclusion

While this report is intended to aid CAA in their development of a strong governance foundation and first five-year strategic plan, we would like to encourage the continued use of the Nonprofit Lifecycles framework and its identified performance outcomes of future phases. As CAA continues to grow, eventually moving out of the start-up phase, Susan Kenny Stevens' Nonprofit Lifecycles book will serve as a valuable resource for identifying common challenges you may face and outcomes to strive for. In addition, we recommend scheduling a work session by the end of this year to discuss strategic plan initiatives. All strategic planning initiatives should hold a strong and responsive governance framework at their core to ensure sustainability.

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Appendix A

SWOT Matrix developed by CAA Board of Directors,

April 2021.

	Helpful to achieving the objective	Harmful to achieving the objective
Internal Origin (attributes of the organization)	<p style="text-align: center;">Strengths</p> <ol style="list-style-type: none"> 1. The CAA board and organization as a whole all have strong relationships with the community 2. All members of CAA are incredibly strong doers and movers; work efficiently 3. All members of CAA have enthusiasm, creativity, and inspiration 4. Everybody is dedicated to the success of arts in the area 5. All have professional skills which contribute to the success of CAA and lead to a robust skillset. 	<p style="text-align: center;">Weaknesses</p> <ol style="list-style-type: none"> 1. A lot of internal/external activity with insufficient infrastructure to support 2. Little to no internal work done to increase visibility 3. The board has mainly met over Zoom, so there's been less face-to-face interaction
External Origin (attributes of the environment)	<p style="text-align: center;">Opportunities</p> <ol style="list-style-type: none"> 1. Ignite the community and different audiences via technology 2. Enhance cultural activities 3. Work with different groups within the community (like for First Friday) 4. City shares the vision of Troutdale becoming an art destination 5. To promote tourism and enhance the local economy <p style="text-align: center;">“Engage, inspire, empower”</p>	<p style="text-align: center;">Threats</p> <ol style="list-style-type: none"> 1. Low visibility from the public due to COVID 2. Little excitement and understanding from community about CAA's goals and benefits 3. Community safety concerns and skepticism as a result of COVID restrictions 4. Membership fee of \$35 as a barrier

Appendix B

Sample Board Development Matrix, used to identify board member skills, demographics, and expertise.

Board Matrix Worksheet	# of Current Members	# of Prospective Members	Total Members
Areas of Expertise/Leadership Qualities			
Administration/Management			0
Early-stage organizations/start-ups			0
Financial oversight			0
Fundraising			0
Governance			0
Investment management			0
Law			0
Leadership skills/motivator			0
Marketing, public relations			0
Social Media Skills			0
Website Development			0
Human resources			0
Strategic planning			0
Physical plant (architect, engineer)			0
Real estate			0
Understanding of community needs			0
Technology			0
Arts Administration			0
Event Management			0
Other			0
Resources			
Money to give			0
Access to money			0
Access to other resources (foundations, corporate support)			0
Availability for active participation (solicitation visits, grant writing)			0
Community Connections			
Religious organizations			0
Corporate			0
Education			0
Media			0
Political			0
Philanthropy			0
Small business			0
Social services			0
Arts Organizations			0
Other			0
Personal Style			
Consensus builder			0
Good communicator			0
Strategist			0
Team member			0
Visionary			0
Age			
Under 18			0
19 – 34			0
35 – 50			0
51 – 65			0
Over 65			0

Appendix C

Fundraising plan sample excerpt.

Month	Fundraising Activity	Volunteer Hours/# Volunteers	Cost	Goal Income	Net Income	Notes
Nov 2021	Giving Tuesday	10 hrs/2 (1 for campaign posting, 1 for thanking)	\$ -	\$ 500.00	\$ 500.00	*Direct ask via Facebook & Instagram *Thanked via email and a letter
Dec 2021	Direct Ask Mail Campaign	5-10 hrs/2 volunteers	\$ 500.00	\$ 1,000.00	\$ 500.00	*List of current donors w/ addresses *Write a letter asking for funds and detailing successes * cost of envelopes, stamps & printing

Appendix D

Resource List

MEMBERSHIP & SPONSORSHIP LEVELS

The following resources provide sample membership structures and benefit levels from three organizations. These are intended to guide CAA as they strategically restructure their memberships.

Oregon Society of Artists

<https://public.osartists.org/public/membership>

Silverton Arts Association

<https://www.silvertonarts.org/membership.html>

Umpqua Valley Arts Association

<https://uvarts.com/membership>

PROGRAM ASSESSMENT TOOLS

National Assembly of State Arts Associations

An introductory guide to program evaluation for arts nonprofit organizations.

https://nasaa-arts.org/nasaa_research/getting-started-program-evaluation

Of/By/For All: Who's Coming? Respectful Audience Surveying Toolkit

A comprehensive toolkit to better understand how to survey audiences. It includes a practical guide to collect data, survey template, and additional tips for how to capture data that supports CAA's strategic goals. https://static1.squarespace.com/static/5a8e0a68f9a61e43fb3eb0e2/t/5d0cf607a5ad8200016a8b06/1561130515568/OFBYFOR_ALL_Respectful_Audience_Surveying_Toolkit.pdf

Better Evaluation

Website with various resources about evaluation processes, methods, and approaches.

<https://www.betterevaluation.org>

SOCIAL MEDIA

Canva

A simple platform to create social media content free to nonprofits. The platform contains templates for all kinds of media and marketing content. <https://www.canva.com/canva-for-nonprofits>

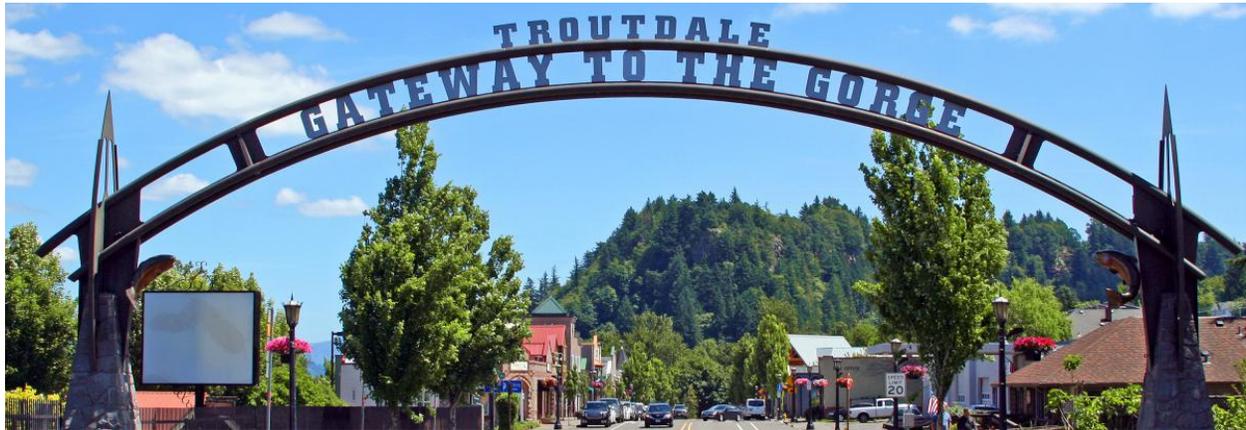
Hootsuite

Essential tips for implementing a successful social media presence.

<https://blog.hootsuite.com/social-media-for-nonprofits/>

Appendix E

Final Presentation



Foundations for Strategic Growth: Cascadia Arts Association

Emily Dale, Jessica Hole, & Brittany Mattice
June 7, 2021



UNIVERSITY OF
OREGON

School of Planning, Public
Policy and Management

Presentation Overview



- 01 Scope of Work
- 02 Research Process
- 03 Findings
- 04 Group Discussion & Questions
- 05 Recommendations

Scope of Work

Included a five-year strategic plan to help the Board of Directors fulfill its vision and foster sustainability. CAA's proposed strategic elements include the following:

Membership Growth
Fundraising & Finances
Programs & Events
Partnerships



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Research Question

What are best practices for developing the first strategic plan for a newly formed arts nonprofit?

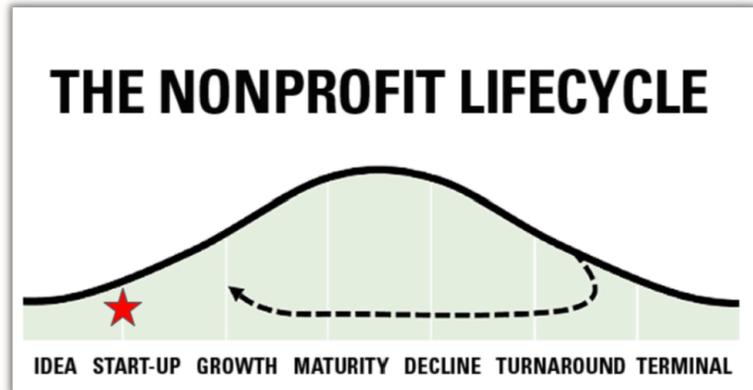


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Grounding Framework

Key Focus Areas

1. Diagnostic Tool
2. Capacity Builders
 - Programs
 - Management
 - Governance
 - Financial Resources
 - Systems
3. Performance Outcomes



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Methods

1. Focus Group with Board of Directors
 - a. Seven CAA attendees
2. Survey of East Multnomah County Arts Community
 - a. 96 surveys distributed; 51% response rate
3. Content Analysis of Strategic Planning Documents
 - a. Lane Arts Council
 - b. Clackamas County Arts Alliance



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Organizational Strengths

- Collective passion for the arts and Troutdale community
- Foundational structures in place (Bylaws, budgets, etc.)
- Mission-centered
- Robust set of skills amongst the Board of Directors
- Proven adaptability and resiliency through COVID
- Staff support for Fall Festival of the Arts

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Findings



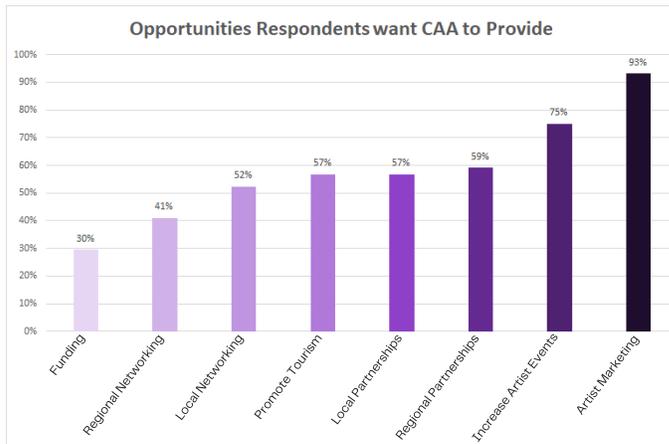
The board desires more defined roles and responsibilities

COVID-19 has stalled some of CAA's efficiency

Current board infrastructure proves difficult to sustain CAA's goals

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Additional Findings



Artists and community members identified clear aspirations for CAA

Both CAA and the community desire additional program offerings

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Additional Findings



The City of Troutdale partnership is an asset to CAA's growth and development

Cross-promotion and coordination of services is critical for future partnerships

Fall Festival of the Arts ignites excitement

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Questions and Discussion



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Governance Foundations

Board governance is the heartbeat of the organization

1. It ensures the organization is operable
2. It provides strategic and mission-driven direction

Attributes of a high-functioning board include:

1. Clear definition of board roles and responsibilities
2. Designated committee structures
3. Active cycle of board recruitment and transition
4. Engaged ambassadorship & advocacy

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Recommendations

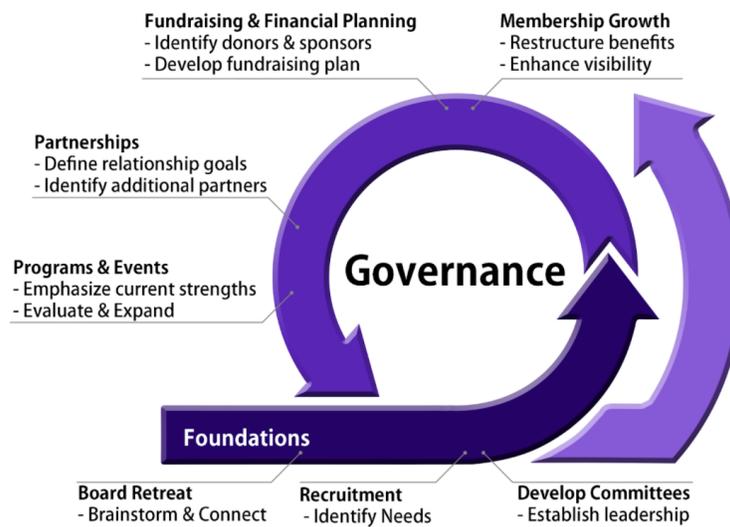
Board Governance

Schedule a board retreat with the following main priorities:

1. Review and update board job descriptions.
2. Fill out board development matrix

Implement a board recruitment strategy

1. Continue use of board development matrix
2. Pinpoint gaps in board members' skills and expertise



Recommendations

Membership Growth

- Restructure membership levels
 - Define benefits and cost
 - Provide tangible benefits



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Example: Oregon Society of Artists

Youth Member | Ages 13-17

Free (Youth membership is available to youth ages 13-17)

- Reduced enrollment fees for classes and/or workshops offered at OSA featuring well-known regional, national, and international artist/instructors
- Ability to exhibit your work in the OSA gallery for non-juried shows, and to submit your work for juried shows

[Add Youth Member | Ages 13-17 To Cart](#)

Student Member

\$40 (Student members must be in an accredited degree program, with a current student ID)

- Reduced enrollment fees for classes and/or workshops offered at OSA featuring well-known regional, national, and international artist/instructors
- Ability to exhibit your work in the OSA gallery for non-juried shows, and to submit your work for juried shows
- Opportunities to network with fellow artists in all OSA activities, meetings, and social functions
- Volunteer opportunities that help bring visual arts to our community

[Add Student Member To Cart](#)

Individual Member

\$85 (Individual)

- Reduced enrollment fees for classes and/or workshops offered at OSA featuring well-known regional, national, and international artist/instructors
- Ability to exhibit your work in the OSA gallery for non-juried shows, and to submit your work for juried shows
- Subscription to OSA's newsletter, *BrushMarks*
- Opportunities to network with fellow artists in all OSA activities, meetings, and social functions
- Volunteer opportunities that help bring visual arts to our community

[Add Individual Member To Cart](#)

Example: Umpqua Valley Arts Association

Categories

Student Membership FREE WITH STUDENT ID <i>UVA Membership begins upon date of purchase and is good for one year.</i>	Teacher Membership \$46 WITH TEACHER ID <i>UVA Membership begins upon date of purchase and is good for one year.</i>
Individual Membership \$65 <i>UVA Membership begins upon date of purchase and is good for one year.</i>	Family Membership \$95 <i>UVA Membership begins upon date of purchase and is good for one year.</i>

Benefits

- Discounts on adult classes & workshops, room rentals and kids' summer art camps
- 10% off in the UVA Gift Gallery
- Special invitations to events, artist talks & lectures
- Opportunity to hang one work of art at the annual Members' Show
- Your Membership supports year-round ongoing arts events and programming for our communities throughout Douglas County!

Recommendations



Membership Growth

- Enhance visibility
 - Fall Festival of the Arts
 - Social Media



Recommendations

Fundraising & Financial Planning



- Identify & define sponsorships and donors
 - Define
 - Re-structure
 - Outline decisions on website

Recommendations

Fundraising & Financial Planning

- Develop fundraising plan
 - 1-year plan using excel

A screenshot of an Excel spreadsheet titled "Fundraising Plan Template". The spreadsheet has a blue header row with the following columns: "Month", "Fundraising Activity", "Volunteer Hours/# Volunteers", "Cost", "Goal Income", "Net Income", and "Notes". The "Month" column is highlighted in yellow. The rows below the header are empty, with a green border around the "Net Income" cell in row 15. The Excel ribbon is visible at the top, showing tabs for File, Home, Developer, Insert, Draw, Page Layout, Formulas, Data, Review, View, Help, and Acrobat. The status bar at the bottom indicates "P13".

Recommendations



Programs & Events

- Year 1
 - Focus on current strengths with FFA
 - Identify goals in areas of revenue, number of attendees, and awareness/connections made
 - Implement a post-event assessment process
- Years 2-5
 - Evaluate & expand per FFA outcomes
 - Revisit long-term goals and identify partnerships

Recommendations



Partnerships

- City of Troutdale partnership evolution
 - Decision-making structures and communication channels
- For future partnerships:
 - Identify potential partner
 - Clearly define CAA's intended goals of the partnership
 - Discuss goals with partnering organization and come to a mutually beneficial consensus
 - Formulate systems to achieve goals

Conclusion



Considerations for Sustainability

1. Continue use of Nonprofit Lifecycles performance outcomes
2. Center all strategic planning around governance best practices

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Thank You



*“Engage.
Inspire.
Empower.”*

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