

Educational Theatre Company					
Strategic Workplan 2020 - 2023					
Date adopted: January 19, 2021			Date revised:		
Goals, Objectives and Action Steps			Responsible Parties	Begin & End Dates	Current Status
GOAL 1: Recover and Create Institutional Sustainability					
Objective 1		Ensure stabilized accounting			
Action steps	A.	Cut accounting firm and set up cloud based Quickbooks	ED, MD	12/2020 - 1/31/2020	
	1	Establish best practices and maintain monthly accounting schedule	ED, MD, DD, and Finance Committee	1/1/2021	
	2	Review and simplify Class list and internal taggings	MD, ED	Dec-20	
	3	Carry out payroll, tax return prep & other financial related functions	ED, MD	ongoing	
	B.	Monitor budget	ED, MD	monthly	
	1	Continue monthly reports and notify finance committee of any significant (\$10k) changes	ED, MD, DD, Finance Committee	monthly	
	2	Evaluate and adjust budget quarterly if needed as financial outlooks change	ED, MD, Finance Committee, Board	quarterly	
	C.	Research and hire new accounting firm	ED	2022 at earliest	
Objective 2		Ensure functionality of administrative office			
	A.	Create functioning office space for admin staff	ED, MD, DD	1/1/2020	
	1	Take steps to ensure high quality internet and phone remote capability for remote working	MD	Dec-20	
	2	Access the processes and monitor budget for reinstating physical office (ie remote stipend, or new equipment)	ED, MD	ongoing	
	3	Research and find new office space	ED, MD, DD	2022 at earliest	
	B.	Assess effectiveness of computers for office and film storage	ED, MD, DNM	Fall of each year	
	1	Donate or purge any outdated equipment	MD, Staff	Fall of each year	
	2	Pursue donation or funding opportunities for office and film equipment	DD	ongoing	
	C.	Streamline document sharing	MD	Fall of each year	
	1	Organize Buffalo online document sharing and Google Drives for programming	MD, summer interns, volunteers	Summer of each year	
	D.	Monitor Zoom Account(s)	MD, DNM	ongoing	
	1	Update procedures and best practices	MD, DNM, DCD	ongoing	

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Objective 3	Monitor space needs for administrative office and storage			
	A.	Find new rental storage space and plan logistics for moving	ED, MD	10/2020 - 12/2020
	1	Purge, donate, give away items in storage	DNM, MD, DD, Staff, Board	10/2020 - 12/2020
	B.	Pursue partner space for additional storage	MD	10/2020 - 12/2020
	1	Hold meetings with partners to propose storing items at their site (ie. McKinley, Trinity)	MD, DD	11/2020-3/2021
	2	Access items, move, and update inventory	MD, DNM, Staff, Board	ongoing
	C.	Evaluate storage space	MD, DNM, DD	Fall of each year
	D.	Structure a calendar and system for storage cleaning and staff check in	MD, DD, Storage Staffer	Fall of each year
GOAL 2 : Racial Equity and Strengthening Diversity and Inclusion				
Objective 1	Establish a shared vocabulary around race equity, structural racism, and other terms			
Action steps	A.	Review and update ETC Diversity and Inclusion statement	ED, MD, Board	April 2021 - review; updates ongoing
	1	Create common ETC vocabulary as universal language for company	MD, Staff, Board	April 2021?
	2	Update HR handbook and all policies to reflect vocabulary	MD	
	3	Implement diversity language changes to job descriptions	MD	ongoing
Objective 2	Identify race champions on the board and staff who can drive accountability			
	A.	Send out survey to champions to get input and feedback	MD, DD	March 2021?
	1	Review feedback and adjust policies and/or procedures to reflect feedback		July 2021
Objective 3	Participate in community offered programs that support equity, diversity, and inclusion (EDI)			
	A.	Attend Orr group EDI workshops	MD, board	ongoing
	1	Share information learned to staff and board	MD, board	12/2020
	B.	Participate in Arlington Dialogues on Race and Equity Community Conversations	MD, staff, board	12/2020
	1	Take assessment about Perspectives of Race and Equity	Arlington Staff and Board	11/2020
	2	Send board and/or staff to participate in community conversations	Staff and Board	2021 ongoing
	3	Train and partner with Arlington DRE and involve our community members in small sessions	MD	Winter/Spring 2021
	C.	Seek opportunities to find new programs or training	staff and board	ongoing
	1	Involve a community member(s) to support the effort	staff and board	ongoing
Objective 4	Form board and staff EDI committee for long-term change			
	A	Create a diversity and inclusion network	ED, MD, DD	2021 - 2022

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	1	Partner with other organizations to pool resources to expand hiring opportunities	Board, Staff	Beg 2022 on	
	2	Identify local minority serving institutions in our region to partner and learn from	MD, DD, Board	2021 - ongoing	
	B	Increase community awareness of the steps taken	MD, DM	Summer 2021	
	1	Create section on the website for EDI policy pages	MD, DNM	Fall 2021	
	2	Write blog post, press release or regular newsletter article about ETC's commitment to EDI	DM/marketing committee, DD, grants team,	monthly	
	C	Maintain communications with board and staff surrounding diversity and inclusion	ED, MD		
	1	Hold check-ins with employees and board to see effectiveness of progress	ED, MD	Quarterly - staff prior to board meeting, board at board meeting	
GOAL 3: Invest in a thriving, stable and resilient organization.					
Objective 1	Assess and recommend optimal administrative structure				
	A.	Identify and implement needs of the company - internally or outsourced	ED, MD, DD	quarterly	
	1	Determine staffing needs (full time, part time, outsourcing, interns, teaching artists, etc)	ED, MD, DD, Board	quarterly	
	2	Formalize organization chart; clarify roles and responsibilities	MD	yearly in January	
	B.	Update job descriptions & organizational chart annually	MD, staff	Yearly in first quarter	
Objective 2	Strengthen internal staff communication and evaluation practices				
	A.	Update full time employee handbook and the HR manual	Board member and MD	yearly in second quarter	
	1	Institutionalize HR policies	MD	ongoing	
	2	Consult with pro bono lawyers for updated language and policies	MD	as needed	
	3	Disseminate any updates to staff	MD	quarterly	
	B.	Hold annual reviews for core staff	ED, MD	yearly in first quarter	
Objective 3	Invest in retirement benefits				
	A.	Research retirement third party administrators to reinstate retirement plan in with a small ETC employer match	ED	12/2021?	
Objective 4	Update/refine succession & transition planning for all key staff positions.				
	A.	Review current succession plans & update for all key roles/responsibilities	ED, MD, DD	June 2021	
	1	Create back ups and contingency plans for various types of absences/transitions	ED, MD	June 2021	
	B.	Update succession plans annually; attempt to make them as "evergreen" as possible	ED, MD, DD	January of each year	
Objective 5	Increase number of ETC staff trained in execution of each program				

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	A.	Put in place systematic steps for teaching artist growth	ED, MD, DCD	1/2022	
	1	Hire/train teaching artists to support each program	MD; DASP, DCD	seasonally	
	B.	ETC University - lesson plan documentation & swapping	DCD	Bi-monthly for 2021 and then monthly for 2022 - 2023 (except summer)	
	1	Formalize mentorship program	DCD, DASP	quarterly	
Governance - ADD Goal					
Goal 4:					
Objective 1	Expand board size to 18 members and ensure composition is reflective of the communities we serve.				
	A.	Research local boards; recruit members who are rolling off/transiting	Governance committee	in progress	
	B.	Reach out to 8-10 new board prospects in a variety of professions/communities (APS board members, educators, Title I school teacher/administrator, marketing/HR professionals, arts leaders, theatre professionals)	Governance committee, ED	in progress & continuously	
	C.	As current board members complete their terms, replace them and possibly create a waiting list/queue of vetted prospects	Governance committee, ED	in progress & continuously	
Objective 2	Improve board understanding of roles, responsibilities and communication practices				
	A.	Educate staff who liaise with committees on roles/responsibilities and board members on expectations	ED, chair, board members	ongoing	
Objective 3	Improve board effectiveness, including orientation, work processes, and evaluation				
	A.	Create committee descriptions, timelines, calendars, goals, work plans	Committee chairs	ongoing	
	B.	Annual board meeting evaluations to maintain quality and satisfaction with meetings & progress	Governance committee	annually in October	
	C.	Develop "elevator speech"/talking points on programs for board members	MD; DD; board members		
	1	Hold board retreat to educate and maintain board knowledge of company, programming, and any EDI initiatives	Governance committee; DD, ED, MD	annually in first half of year	
	D.	Update Board Support Commitment forms annually; monitor/encourage participation throughout the year	development committee; governance committee; DD	complete at January board meeting; monitor/reminders by July meeting	
Objective 4	Improve succession practices for board officer positions				
	A.	Clarify steps to transition positions and assign tasks to ensure proper support - ideally have overlap in officer roles	Governance committee; officers	ongoing, as necessary	
	B.	Officer/board member mentoring and shadowing	Governance committee; officers	ongoing, as necessary	
Fundraising & Community Development					
GOAL 5:		Diversify, Maintain and increase Contributed Income			
Objective 1	Expand/maintain individual giving				
	A.	maintain current attrition rate of no higher than 10% to be assessed twice a year	DD	Assess twice a year - January and June	

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	B.	Add additional individual donors each year by 10% of the total number to be assessed annually	DD	Assessed annually	
	1	Grow individual donors through specific giving challenges (ie DoMore24 and GivingTuesday)	DD	ongoing	
	C.	Increase overall individual donation amounts by 10% each year	DD	Assess twice a year - January and June	
Objective 2		Pursue additional contracts and charitable contributions that support and advance program and organizational goals			
	A.	Seek out grants for general/operations recovery	DD, grants team	ongoing	
	B.	Diversify funding by identifying and securing two new corporate sponsorships each fiscal year	grants team, DD	assess quarterly, complete annually	
	C.	Select grant opportunities that best fit the ongoing needs of the company	DD, grants team	ongoing	
	D.	Increase and train size of grants team	DD, ED, MD	annually - fall	
	1	Weigh amount of cost and time attached to adding new grants team members	DD	ongoing	
Objective 3		Engage partners, funders and other stakeholders to renew understanding of their needs and assets, and to review program goals, results and options			
	A.	track grants applied for but not received and any feedback provided to better inform future applications	DD	ongoing	
	B.	maintain regular communication with ongoing funders via emails, phone calls, and in-person meetings	DD	ongoing	
Marketing					
GOAL 6: Strengthen and Streamline Marketing Strategies					
Objective 1		Maintain marketing committee comprised of staff and board			
	A.	Board will oversee marketing efforts on a regular basis and campaigns giving insight, ideas, and feedback when needed	marketing committee board members	ongoing	
	1	Seek marketing intern	ED, marketing committee board members	winter 2021	
	B.	Create yearly marketing plan	DNM, MD, DD, marketing committee oversee	annually in January	
	1	Assign tasks to be covered and provide training if necessary for execution until a DM is hired	MD, marketing committee	January 2021 and ongoing	
	2	Evaluate marketing tactics to ensure effectiveness (ie Peach Jar, flyers, social media, and newsletter)	MD, DD, DNM, and marketing committee	ongoing	
	C.	Expand marketing efforts to find more students	marketing committee	ongoing	
	1	Explore broad PTA marketing	marketing committee	ongoing	
	2	Discuss strategies to promote specific new programming (ie Neighborhood classes, online classes, adult classes)	marketing committee	ongoing	

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	D.	Hire Director of Marketing	MD, ED	January 2022?	
	1	Create job description and evaluate if position is combined with other administrative tasks	MD	July 2021?	
	2	If DM position is vacant, parse our task among marketing committee	MD, DNM, marketing committee	2021	
PROGRAMMING					
GOAL 7: Focus and Grow Program Offerings					
Objective 1		Continue to offer and grow online courses			
	A.	Offer 3 seasons a year of Collaborative Classroom online classes for preschool - high school	DCD, DASP MD	ongoing	
	B.	Offer 4 seasons of online Creative Age	MD	ongoing	
	C.	Offer 4 seasons of online adult classes	MD	ongoing	
Objective 2		Expansion of In-person Offerings and Increased Enrollment			
	A.	Grow Neighborhood in-person classes - 4 to 5 classes 3x a year	DCD, DASP, MD	December 2021	
	1	Pursue locations for expansion and growth	DD, MD	June each year	
	2	Evaluate budget and cost effectiveness	ED, MD, DD	June each year	
	B.	Find sites to hold in-person Drama Days and other no-school programming	MD, Board	ongoing	
	C.	Create evaluations to ensure programming is meeting the needs of the community	DCD, MD	ongoing	
	D.	Collaborate with teachers and coordinators to offer in-school workshops, Grab and Go workshops, and STEAM programming	DCD		
	1	Identify and pursue new sites	DCD, MD, board	ongoing	
	2	Continue and expand current sites	DCD	ongoing	
Objective 3		Reinstate Shakespeare in Schools Programming			
	A.	Allot hours from funding to reinstate Asst. Dir of SIS	ED, MD, DD	Spring 2021	
	1	Reach out to previous schools to offer online options of programming	ADSIS, DCD, MD	Jan-June 2021	
	2	Create plan to execute and adjust funding for online or in-person programming	ADSIS, MD, DD	Jan-May 2021	
	B.	Evaluate Dir of SIS and Asst. Dir of SIS positions and hire accordingly - review and reset job descriptions	ED, MD	June 2021	
	C.	Improve marketing and outreach; create awareness in communities	ADSIS, MD, DNM, DCD, DM, marketing committee	ongoing	
	1	Find broad marketing tactics to reach school districts with programming options	ADSIS	ongoing	
	2	Update marketing flyer to ensure effectiveness	ADSIS, DM	February 2021	

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	D.	Cultivate relationships with partners in the community	ED, MD, DD, ADSIS, Board	ongoing	
	1	Find community performance and coaching opportunities to maximize exposure (ie New District, Shakespeare Festival)	ADSI, DM, Staff, Board	ongoing	
Objective 4		Continue expansion of Specialized Programming - separate into individual programs??			
	A.	Creative Age Expansion of in-person classes - 1 new site a year	MD	ongoing	
	1	Find sustainable budget/model to use without grant funding	MD	ongoing	
	2	Seek grant opportunities to offset participant costs; seek low income partners	DD, MD	ongoing	
	B.	Devising Hope	DSP, MD	ongoing	
	1	Lock in yearly funding through seasonal planning meetings	DDHope, MD, DD	annually in January	
	2	Create internal planning schedule and marketing plan to ensure enough teen participants and continue to expand partnership with Street Sense	DDHope, MD, DM/marketing committee	annually in the fall	
	3	Explore other types of programming for the Street Sense community	DDHope, MD	ongoing	
	4	Expand program to other partners and communities (ie Doorways, Bridges to Independence)	MD, DD, DM/marketing	ongoing	
	C.	Continue Adult Topics in Theatre Programming	MD, staff	ongoing	
	1	Evaluate model and feasibility - document model	MD, staff	quarterly	
	2	Brainstorm target audience and pursue ways to expand class numbers	MD, staff, DM/marketing committee	ongoing	
	D.	Grow ETC Beginnings for Preschoolers - 1 new class site per year	MD, DASP	ongoing	
	1	Reconnect with previous partners	MD, DASP	ongoing	
	2	Pursue new sites; outreach to schools & daycare providers; 1 new partner a year	MD, DASP, DM/marketing committee	ongoing	
	E.	Train and invest in additional staff to maximize growth and effectiveness of program	DCD	ongoing	
	F.	Improve marketing and outreach efforts to find new audiences and program visibility	DM/marketing committee	ongoing	
Objective 5		Restablish Security in Summer Camp - different wording??			
	A.	Evalute summer camp needs of community - online vs. in-person	ED, MD, DCD	winter 2021	
	1	Send camp survey to previous families to gauge need	MD, DCD, DNM	winter 2021	
	B.	Evalute number of camps, dates, timing and registration trends	Executive Staff	winter 2021	
	C.	Grow Camp Sites	MD, DCD	ongoing	
	1	Continue to develop relationships with current program partners to become regular sites	MD	ongoing	
	2	Pursue new site partnerships	MD, staff, board	ongoing	
	3	Create emergency site back up plans due to county uncertainty	ED, MD, DD	winter 2021	
	4	Enhance and market scholarship opportunities to more communities and partners	DM, marketing committee	ongoing	

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