

THE
CABARET™

STRATEGIC PLAN
2020-2024

INDEX

Introduction and Context.....	Page 3
Strategic Plan Executive Summary.....	Page 4
Organizational Mission & Vision	Page 5
Organizational Values.....	Page 6
Summary of Plan Themes, Goals, Objectives & Tactics.....	Page 8
Plan Detail – Theme 1: Support Our Team.....	Page 11
Plan Detail – Theme 2: Strengthen Our Operations.....	Page 13
Plan Detail – Theme 3: Sustain Our Excellence.....	Page 16
Strategic Planning Leadership Committee.....	Page 18
Plan Process, Research & Informing Materials.....	Page 19
Conclusion.....	Page 20

INTRODUCTION AND CONTEXT

In the spring of 2019, The Cabaret engaged Norton Philanthropic Counsel to assist with the creation of the organization's next strategic plan. Following plans generated in 2012 and 2015, construction of the current plan was based on a new and significant reality in the organization's relatively recent move from The Columbia Club to a more permanent location at 924 N. Pennsylvania Street, Indianapolis, Ind. in the spring of 2018.

This is an important moment in the life of The Cabaret. As organizational and Board leadership consider plans for the future, the new location makes several opportunities available to the organization for the first time including:

- The ability to increase programming due to the autonomous and complete control of the venue schedule
- Expanded seating capacity offering the possibilities for increased exposure and ticket sales
- The potential for venue rental income outside of Cabaret-sponsored performances and events

These opportunities, alongside additional changes in staff and staffing structure, have created both opportunities for and challenges to the organization's operating budget and operational cadence.

Additionally, the marketplace anticipates the introduction of direct competition in the form of a new cabaret performance venue in Carmel, Ind. Backed by Michael Feinstein, the emerging cabaret is expected to open in 2020 and presents the first formidable challenge to the existing Cabaret in terms of competition for both patrons and artists.

The organization committed considerable time and effort to the 2019 strategic planning process. A Strategic Planning Leadership Committee was formed to both guide the process and accomplish the vast majority of work on the plan. The in-depth planning process included a review and revision of the organization's mission and vision statements and – for the first time – also included the creation of organizational values statements.

The themes, goals, objectives and tactics in this plan are the outcomes of the research, feedback, and strategic thinking performed by the planning committee throughout the process. Their participation was invaluable and a critical component of the meaningful final product.

It is important to note that this strategic plan has an expected life of five years and its successful completion will most certainly involve not only the staff, but also the active participation of the Board of Directors and other committed advocates. Norton Philanthropic Counsel was proud to work alongside The Cabaret in the creation of this strategic plan.

STRATEGIC PLAN EXECUTIVE SUMMARY



STRATEGIC PLAN FRAMEWORK 2020-2024

VISION

To expand our reach and influence as a nationally renowned cabaret where premier performance and radical hospitality intersect to create an experience for all that is uniquely The Cabaret.

MISSION

The Cabaret is a nonprofit organization dedicated to elevating and promoting the cabaret art form by entertaining, educating and engaging audiences and artists through world-class performance.

VALUES

We deliver the WOW
We practice radical hospitality
We welcome everyone here
We invest in each other
We do the right thing

STRATEGIC FOCUS AREAS

1

Support
Our People

2

Strengthen
Our Operations

3

Sustain
Our Excellence

STRATEGIC GOALS

1.1

Define optimal
staffing &
structure

2.1

Increase contributed
revenue via
fundraising

3.1

Continue
excellence in
programming via
premier talent

1.2

Draft work
plans &
metrics for
accountability

2.2

Increase earned
revenue via
performances &
venue rental

3.2

Promote
sustainability via
loyalty & diversity

1.3

Invest in team
personal &
professional
development

2.3

Promote solid
business
practices &
efficiencies

3.3

Increase brand &
visibility via strong
marketing &
communications

3.4

Identify & clarify
educational
programming

ORGANIZATIONAL MISSION & VISION

The strategic planning process for The Cabaret involved an in-depth analysis of the organization's mission and vision statements. After much review, the Planning Committee recommended changes to both statements to better reflect The Cabaret's unique attributes and strong desire for increased impact.

Following is The Cabaret's previous mission statement, followed by the Committee's recommendation for an updated mission statement that clearly and succinctly expresses the difference the organization makes in the world.

Previous Mission Statement

To elevate and promote the cabaret art form by presenting the finest in professional cabaret performances and developing the next generation of cabaret artists.

New Mission Statement

The Cabaret is a nonprofit organization dedicated to elevating and promoting the cabaret art form by entertaining, educating and engaging audiences and artists through world-class performance.

The new mission statement is a stand-alone statement that better defines the "who" (The Cabaret, a nonprofit organization), the "how" (by entertaining, educating and engaging), and the "for whom" (audiences and artists).

Similarly, the Committee recommended an updated and inclusive vision statement that more clearly articulates the organization's future destination, captures its competitive advantage, and inspires everyone to be involved.

Previous Vision Statement

To solidify The Cabaret's significance in the national cabaret scene.

New Vision Statement

To expand our reach and influence as a nationally renowned cabaret where premier performance and radical hospitality intersect to create an experience for all that is uniquely The Cabaret.

ORGANIZATIONAL VALUES

As mentioned in the introduction, this strategic planning process included the creation of values statements for the first time in the organization's history. In keeping with the theme of "Support Our People," CEO and Artistic Director Shannon Forsell requested the Committee's permission to allow the staff to take on the task of building out values statements once a series of common values were defined.

The team considered values that would inspire their daily work as well as promote a work culture that reflects the unique spirit of the organization. As part of that spirit, the team recommended a series of bullet points under each statement to further clarify the meaning of each values statement. Following are the five recommended values statements for The Cabaret.

We Deliver the WOW

- Our dedication to artistic quality is second to none. It defines us. We deliver artists that inspire awe and provide unique experiences our patrons can't get elsewhere. We take pride in our stellar track record of artists who want to return.
- Our commitment to excellence lives in everything we do. Details matter to us. We display quality in all aspects of the organization, from our daily work to the patron experience and beyond. We never stop improving and our rigorous standards ensure this commitment.
- Our passion for the mission drives us. It's why we are here. We are committed to delivering a wide variety of meaningful and inspiring experiences for our artists, patrons, partners, and the community. The work we do thrills us, too.

We Practice Radical Hospitality

- Our brand is built on being the best in hospitality. We love this. We provide a memorable experience where kindness and respect permeate every facet of our work. We want those we serve to enjoy an engaging and personal respite from everyday life, and we strive to exceed expectations.
- Our culture of genuine gratitude is on display. We leave our egos at the door and the drama on the stage. We make thankfulness and appreciation customary features of daily work life by regularly showing all of those we touch that we're grateful for their contributions to our success.
- Our atmosphere is positive and fun. It's how we roll. We choose to approach work in an optimistic way and are always friendly, personable, and responsive to others. We work hard but we keep things in perspective and make work fun whenever possible.

ORGANIZATIONAL VALUES (CONTINUED)

We Welcome Everyone Here

- Our commitment to diversity runs deep. We revel in difference. We invite everyone into the experience and work hard to nurture diversity, inclusivity, acceptance, and accessibility. We respect everyone and strive to make all – from patrons to artists, staff, Board, and beyond – feel valued and appreciated.
- Our environment fosters inclusion and reflects our community. It makes us stronger. We maintain a warm, friendly, and open atmosphere where all who touch us are engaged, seen, heard, and celebrated – regardless of ethnicity, gender identity, sexual preference, or socio-economic background.
- Our actions speak louder than words. We wouldn't have it any other way. We leverage relationships with key partners to pursue programs and educational opportunities that reflect and serve our community. We invest in training that promotes diversity, equity, and inclusion and continue to diversify our board.

We Invest in Each Other

- Our support for each other is defined by care. We don't talk about each other, but to each other. We value one another as individuals and promote harmony and trust in our work. We deal with issues immediately, directly, and with respect. We foster a work culture that prioritizes well-being, balance, and personal and professional growth.
- Our greatest work is accomplished as a team. No one does it alone. We are devoted to a trusting environment where employees feel appreciated and empowered to do their best work. We believe in teamwork, collaboration, and leveraging our collective genius.
- Our individual and creative contributions are celebrated. We are unique and proud of it. We encourage all team members to openly share their differences, opinions, views, and ideas without fear. We are consistently honest, respectful, and genuine. We promote projects and ideas that energize our employees and give them purpose. We take time to celebrate our successes.

We Do the Right Thing

- Our work is defined by strong performance and accountability. If it's to be, it's up to me. We operate with clearly defined goals and objectives and reward excellence. We are accountable to ourselves, each other, and the organization. We go the extra mile to make sure we deliver our very best in all we do.
- Our focus is on best practices and long-term success. We're in it for the long haul. We support our mission and vision in a manner that ensures our long-term survival and lasting influence. We are committed to an audience, artist, and employee experience that is unique and approaches risk in a thoughtful, brave, and responsible way. We are structured, organized, and positioned for flexibility, adaptability, and future success.
- Our operations support ethical and responsible behavior. The buck stops with us. We value systems and protocols that promote the outcomes we desire. We are responsible with our resources and good stewards of the funds entrusted to us, creating world-class experiences with elegance and economy. We cherish open, honest, and complete internal and external communications.

SUMMARY OF PLAN THEMES, GOALS, OBJECTIVES & TACTICS

The Strategic Planning Leadership Committee identified three core themes as the most important overarching areas of focus for The Cabaret in the coming years: 1) support our people, 2) strengthen our operations, and 3) sustain our success. The organization’s most urgent goals and objectives – as well as the suggested tactics for their successful completion – follow in the table below spanning three pages of this report.

THEMES <i>WHAT THIS PLAN IS ALL ABOUT</i>	GOALS <i>WHAT ARE OUR PRIMARY INITIATIVES?</i>	OBJECTIVES <i>WHAT WILL HELP US ACHIEVE OUR INITIATIVES?</i>	TACTICS <i>HOW WOULD WE GO ABOUT COMPLETING THESE TASKS?</i>
SUPPORT OUR PEOPLE	I. Define optimal staffing and structure	A. Assess and act on CEO and Artistic Director/organizational structure	1. Job descriptions 2. Needs/capacity assessment 3. Define financial assumptions
		B. Formalize succession plan and vacancy opportunities	1. Ad-hoc committee to create plan 2. Emergency survival plan 3. Hiring and vacancy plan
	II. Draft work plans and success metrics for focus and accountability	A. Formal work plans and performance evaluations	1. Intentional work plans tied to strategic plan 2. Annual performance reviews tied to plan 3. Cross-training plan 4. Staff metrics in KPI report and strategic plan reviews
		B. Define Key Performance Indicators	1. Define KPIs and reporting cadence 2. Internal system for updating report 3. Annual review system with Board
	III. Invest in team personal and professional development	A. Promote a positive culture by clarifying needs and expectations	1. Skills and personality assessments 2. Regular HR trainings 3. Regularly explore organizational values 4. Employee feedback in evaluations
		B. Ensure competitive salary and benefits	1. Identify association metrics 2. Benchmark with others
		C. Foster best practices among the Board and its activities	1. Identify desired best practices 2. Stabilize and grow board membership 3. Annual board evaluations 4. Evaluate Board committee structure

SUMMARY OF PLAN THEMES, GOALS, OBJECTIVES & TACTICS (CONTINUED)

THEMES <i>WHAT THIS PLAN IS ALL ABOUT</i>	GOALS <i>WHAT ARE OUR PRIMARY INITIATIVES?</i>	OBJECTIVES <i>WHAT WILL HELP US ACHIEVE OUR INITIATIVES?</i>	TACTICS <i>HOW WOULD WE GO ABOUT COMPLETING THESE TASKS?</i>
STRENGTHEN OUR OPERATIONS	I. Increase contributed revenue through fundraising	A. Grow contributed to \$900,296 by FYE 2023	<ol style="list-style-type: none"> 1. Comprehensive development plan 2. Donor recognition and cultivation 3. Grants that support diversity, equity and inclusion
		B. Empower staff and Board to assist with advancement activities	<ol style="list-style-type: none"> 1. System to encourage, manage and report engagement activities 2. Cultivation and stewardship plan/report 3. Include in job duties for all staff 4. Optimize use of Board Development Committee
		C. Grow an endowment fund to \$1 million in commitments by FYE 2023	<ol style="list-style-type: none"> 1. Ensure consistent management/investment policies 2. Planned giving legacy society 3. Incorporate best practices in asks 4. Ensure planned giving in Mar/Comm promotion
	II. Increase earned revenue from performances and venue rental	A. Leverage current stakeholders to achieve 95% capacity	<ol style="list-style-type: none"> 1. Identify desired audience and partner profiles 2. Conduct market analysis and develop strategies 3. Research affinity group partnerships 4. Board VIP table and engagement activities
		B. Grow venue rental revenue to \$115,000 by FYE 2023	<ol style="list-style-type: none"> 1. Review venue capacity and ROI metrics 2. Assess pricing and benefit packages 3. Identify preferred partners and promotional outlets 4. Brainstorm new opportunities annually
		C. Assess other earned revenue opportunities to enhance profits	<ol style="list-style-type: none"> 1. Annual time to explore big event and/or other ideas 2. Critical data points to assist decision-making and plan execution
	III. Promote solid business practices and efficiencies	A. Comprehensive policies and procedures to support review and oversight	<ol style="list-style-type: none"> 1. Ad-hoc committee to define best practices and develop policies/procedures 2. Formal business analysis every three years 3. Adopt surplus budget and fulfill reserve policy 4. Board special, in-depth project each year 5. Strategic plan review every year, at minimum

SUMMARY OF PLAN THEMES, GOALS, OBJECTIVES & TACTICS (CONTINUED)

THEMES <i>WHAT THIS PLAN IS ALL ABOUT</i>	GOALS <i>WHAT ARE OUR PRIMARY INITIATIVES?</i>	OBJECTIVES <i>WHAT WILL HELP US ACHIEVE OUR INITIATIVES?</i>	TACTICS <i>HOW WOULD WE GO ABOUT COMPLETING THESE TASKS?</i>
SUSTAIN OUR EXCELLENCE	I. Excellence in programming through premier talent	A. Maintain leadership position by engaging peers and identifying programming talent	<ol style="list-style-type: none"> 1. Staff attendance and networking thru conferences 2. Network and collaborate with national cabaret peers 3. Activate advocates to recommend talent
	II. Promote sustainability through stakeholder loyalty and diversified programming	A. Sustain involvement through hospitality and stewardship	<ol style="list-style-type: none"> 1. Opportunities for patron feedback 2. Annual, in-depth patron survey 3. Annual patron profile 4. Audience incentive
		B. Ensure programming encourages diversity, equity and inclusion and expands the umbrella of performance	<ol style="list-style-type: none"> 1. Intentional plan for diversity, equity and inclusion 2. Plan to increase opportunities for diversity through programming 3. Assess market interest in non-traditional programming 4. Explore young professionals board to engage new constituents
	III. Increase brand and visibility through marketing and communications	A. Craft a comprehensive plan focusing on brand promotion	<ol style="list-style-type: none"> 1. Intentional plan that promotes brand and mission 2. Media strategy 3. Ad-hoc committee to assist, if needed 4. Media campaign for public education about our type of cabaret performances
		B. Increase breadth of externally facing team and advocates	<ol style="list-style-type: none"> 1. Identify goals for increased visibility 2. Equip advocates with tools to represent the organization 3. Tie goals to the succession plan
	IV. Identify and clarify educational programming	A. Analyze opportunities for and challenges of educational programming	<ol style="list-style-type: none"> 1. Ad-hoc committee to define goals 2. Formalize understanding of stakeholder needs/desires 3. Evaluate current activities and capacity for increases 4. Identify strategic partnerships to assist

PLAN DETAIL: THEME 1 – SUPPORT OUR PEOPLE

SUPPORT OUR PEOPLE

I. Define the optimal staffing and structure model based on the organization's activity and revenue goals.

A. Assess the existing staff and structure and determine the capacity and need for a separation of the CEO and Artistic Director duties or other changes, as recommended.

1. Secure comprehensive job descriptions and required duties for all staff members.
2. Conduct a needs analysis and capacity assessment – either internally or with third-party assistance – focusing on the capacity for combined or separated CEO and Artistic Director positions and/or staff reorganization.
3. Clearly define the financial assumptions and needs consistent with all changes to staffing and structure.

B. Design a formalized succession plan and system to use staff vacancies as opportunities to reassess personnel needs and organizational opportunities.

1. Establish an ad-hoc personnel subcommittee of the Board to oversee creation of a succession plan and assist the CEO with the development of a vacancy policy.
2. Create a short-term survival plan that addresses key staff departures.
3. Define a strategic organizational hiring process and develop an approval process for filling open positions.

II. Draft and formalize organization-wide work plans and success metrics to promote staff focus and accountability.

A. Develop formal work plans and performance evaluations annually that include success metrics linked to the overarching strategic plan.

1. In collaboration with staff members or third-party experts, as budget allows, create intentional and functional annual work plans that marry staff responsibilities, organizational success metrics and strategic plan goals.
2. Develop and deliver annual performance evaluations clearly tied to job descriptions/duties, goals, and metrics and clearly define future changes as a result of new initiatives or areas of focus.
3. Develop and enact an organization-wide cross-training plan to cover the critical functions for each staff member.
4. Include functional area success metrics in the KPI report and strategic plan reviews.

PLAN DETAIL: THEME 1 – SUPPORT OUR PEOPLE (CONTINUED)

SUPPORT OUR PEOPLE (CONTINUED)

B. Define the Key Performance Indicators (KPIs) to be used in assessing organizational health, achievement of strategic initiatives, and reporting to the Board of Directors or other appropriate parties.

1. With initial Board assistance, define the appropriate KPIs for regular review and identify a consistent distribution schedule.
2. Develop an internal staff procedure for regularly updating and distributing KPI reports.
3. Establish an annual review system for the reported metrics with Board leadership and ratify or refine, as appropriate.

III. Invest in the personal and professional development of our staff and volunteers to promote work satisfaction.

A. Formalize a structure that promotes a positive team culture by defining staff talents, supporting job clarity and satisfaction, and encouraging work/life balance.

1. Conduct skills and personality assessments for staff to identify areas of individuals' strengths, talents and interests.
2. Conduct HR trainings quarterly, at minimum, on relevant topics needed or suggested by the team.
3. Explore organizational values as a team on a regular basis.
4. Include feedback on professional growth and enhanced job satisfaction in all annual performance evaluations and revise employee job descriptions, if needed.

B. Ensure a competitive salary and benefits package for team members.

1. Identify and understand general association metrics with regard to staff salary and benefits.
2. Benchmark the team with those of other cultural organizations, particularly in the geographic area.

C. Examine best practices for Board development and define needed adjustments to Board engagement and activity.

1. Identify desired best practices in Board development, engagement and activity.
2. Create a schedule of incoming and outgoing Board members that stabilizes membership each year and consider increasing Board membership to 25.
3. Create and deliver an annual Board evaluation that includes feedback on activity and opportunities for engagement.
4. Evaluate the existing Board committee structure and use Board task forces to assist staff with specific projects where Board management, oversight and activity is appropriate and desired.

PLAN DETAIL: THEME 2 – STRENGTHEN OUR OPERATIONS

STRENGTHEN OUR OPERATIONS

I. Provide a central focus on increasing contributed revenue through fundraising efforts.

A. Drive strong growth in contributed revenue, year over year, from 2020 through 2023 according to the following schedule:

SOURCE	FYE PROJECTION	2019	FYE 2020	FYE 2021	FYE 2022	FYE 2023	% INCREASE (Year over Year)
Board	\$38,500		\$38,500	\$46,200	\$53,130	\$58,443	0, 20, 15, 10%
Other Individuals	\$100,000		\$100,000	\$120,000	\$144,000	\$165,600	0, 20, 20, 15%
Sponsorships	\$193,000		\$205,000	\$225,500	\$248,050	\$260,453	6, 10, 10, 5%
Grants/Foundation	\$278,000		\$243,000	\$267,300	\$280,665	\$294,698	-13, 10, 5, 5%
Fundraiser/Events	\$72,500		\$79,778	\$95,733	\$110,093	\$121,102	10, 20, 15, 10%
TOTALS	\$682,025		\$666,278	\$754,733	\$835,938	\$900,296	

1. Create, manage and report on a comprehensive development plan which focuses on increased revenue growth from individuals and foundations and includes all earned revenue (gifts), grants, event, and sponsorship activities.
2. Introduce enhanced donor recognition society and cultivation opportunities to promote mid-level annual, major, and planned giving.
3. Identify and actively seek opportunities for grants that intentionally support diversity, equity and inclusion.

B. Broaden the scope of impact by empowering the full staff, Board and other advocates to assist in "friend raising," fundraising, and stewardship.

1. Create a system to encourage, manage and report on strategic donor engagement activities that includes the Board, staff and other volunteers/advocates.
2. Develop a plan to manage and report on current donor relationships with the goal of delivering excellent stewardship as a hallmark of the advancement program.
3. Formally include fundraising and engagement activities in the duties of each staff member.
4. Determine the optimal use of the Board's Development Committee and create and manage a plan consistent with their use in support of organizational and strategic plan goals.

PLAN DETAIL: THEME 2 – STRENGTHEN OUR OPERATIONS (CONTINUED)

STRENGTHEN OUR OPERATIONS (CONTINUED)

C. Begin and grow an endowment fund aimed at long-term sustainability with a goal of \$1 million in committed and/or contributed funds by FYE 2023 (\$250,000 per year from 2020 through 2023).

1. Ensure institutional funds management and investment policies are consistent with the development of a long-term endowment and the promotion of unrestricted donor gifts to support the endowment.
2. Develop, plan and launch a formal planned gift legacy society that encourages constituents to include the organization in their financial and estate plans with unrestricted gifts.
3. Incorporate an ask for annual, major and planned gifts in all donor solicitations as a matter of general practice, when appropriate.
4. Include the active promotion of planned gifts and gifts to the endowment in the organization’s marketing and communications plan.

II. Enhance strategies to increase earned revenue from performances and venue rentals.

A. Leverage current stakeholders to help identify and attract new audiences to achieve 95% capacity across all seasons.

1. Activate the Artistic and Audience Development Committee to help identify desired audience and partnership profiles.
2. Conduct a market analysis based on the ideal audience and partnership profiles and develop robust engagement strategies.
3. Research appropriate affinity group partnerships as opportunities to create and cultivate relationships.
4. Formalize Board engagement activities in support of new patrons by creating a VIP table and assigning new audience metrics to Board members on an annual basis.

B. Assess and optimize strong growth in earned revenue opportunities through venue rentals according to the following schedule:

SOURCE	FYE 2019 PROJECTION	FYE 2020	FYE 2021	FYE 2022	FYE 2023	% INCREASE (Year over Year)
Venue Rentals	\$55,000	\$71,500	\$89,375	\$100,000	\$115,000	30, 25, 12, 15%

1. Regularly review venue capacity options and policies for desired event return-on-investment that includes operational costs like internal/external staffing needs, food and beverage, utilities, maintenance, insurance and other operating costs.
2. Assess and revise, as appropriate, venue pricing and rental benefit packaging for promotion to potential clients annually.
3. Maintain a listing of preferred and/or desired partners – including corporations – and promotional outlets and assess annually, at minimum.
4. Brainstorm and explore the potential for alternative clientele unrelated to current audiences, such as convention visitors, etc., with the board or other stakeholders on an annual basis or as special opportunities arise.

PLAN DETAIL: THEME 2 – STRENGTHEN OUR OPERATIONS (CONTINUED)

STRENGTHEN OUR OPERATIONS (CONTINUED)

C. Assess other earned revenue opportunities such as ticket pricing structure, special and/or new events, etc. needed to enhance a profitable operation.

1. Reserve time to define additional potential revenue opportunities for exploration on an annual basis, at minimum, including a hallmark fundraising event and other opportunities.
2. Determine the critical data points necessary to analyze revenue potential for emerging opportunities as they arise and develop a formal plan that includes appropriate staff and/or volunteer managers to manage and execute the plan.

III. Assess and enhance operations to promote solid business practices and efficiencies.

A. Develop comprehensive policies and procedures that include a best-practices system of review and oversight informed by organizational goals and activities.

1. Assemble an ad-hoc committee to define desired best practices and assist with the development of needed policies and procedures including disaster and crisis management plans.
2. Adopt a surplus budget annually and strive to fulfill reserve policy goals.
3. Conduct a formal business analysis and review every three years with the goal of strengthening activities that provide the greatest return on investment.
4. Equip the Board to provide strategic assistance and an in-depth analysis of at least one special project or organizational need annually.
5. Develop a system for a formal review of the strategic plan goals, activities, metrics, outcomes and revisions with the staff and Board on an annual basis, at minimum.

PLAN DETAIL: THEME 3 – SUSTAIN OUR EXCELLENCE

SUSTAIN OUR EXCELLENCE

I. Focus on excellence in programming by developing a system to support the continued attraction of premier industry talent.

A. Maintain our position as a leader in cabaret performance by engaging our peers and increasing the ways to identify programming talent and opportunities.

1. Support staff opportunities to attend association conferences and other networking opportunities annually, if possible.
2. Create and lead a network of national cabaret peers in support of the art form and opportunities for collaboration.
3. Actively invite Board members, patrons and other advocates to see and recommend talent during travel to other cities.

II. Promote long-term sustainability by enhancing stakeholder loyalty and diversifying programming.

A. Understand and sustain stakeholder involvement through personalized hospitality and exceptional stewardship.

1. Continue to provide opportunities for patron feedback after each show to better understand guest expectations and satisfaction.
2. Plan and execute an annual, in-depth patron survey relevant to the ongoing programs and activities of the organization.
3. Create a comprehensive patron profile to be updated annually, at minimum.
4. Develop and manage audience incentive programs and other engagement activities such as donor travel and special events.

B. Ensure programming encourages diversity, equity and inclusion and embraces a wider umbrella of cabaret performance.

1. Develop an intentional plan to embrace and build the organization's commitment to diversity, equity and inclusion.
2. Regularly and systematically identify performance opportunities that increase the organization's likelihood of attracting diverse audiences.
3. Assess market interest in and organizational capacity for programming that falls outside typical season offerings.
4. Explore the feasibility of a young professionals board with a primary focus on engaging new constituents.

PLAN DETAIL: THEME 3 – SUSTAIN OUR EXCELLENCE (CONTINUED)

SUSTAIN OUR EXCELLENCE (CONTINUED)

III. Increase visibility and strengthen the brand through strategic marketing and communications efforts.

A. Craft and execute a comprehensive plan that focuses on brand promotion through effective marketing and communications.

1. In collaboration with staff members or third-party experts, as budget allows, develop an intentional marketing and communications plan that utilizes current stakeholders, performers, Board and other advocates in promoting the organizational brand and mission.
2. Address an appropriate media strategy that includes active promotion of organizational information through press releases, news outlets, social media and other avenues of community outreach.
3. Establish a formal or ad-hoc committee of Board, staff and volunteers to assist with marketing and communications efforts, if needed.
4. Plan and execute a media campaign or strategies designed to educate the public and potential patrons about our world-class version of the cabaret art form.

B. Broaden the Cabaret brand by increasing the breadth of the externally facing team members and advocates.

1. Identify specific goals and success metrics related to the brand and increased visibility.
2. Formally equip and engage Board, staff and other advocates with the tools necessary to strategically represent the organization and strengthen its presence and geographical reach.
3. Tie brand and visibility goals to the organization's succession plan.

IV. Identify and clarify the role of and goals for educational programming.

A. Conduct an in-depth analysis to determine the opportunities for and challenges of educational programming.

1. Assemble an ad-hoc committee to define and declare organizational goals for educational programming.
2. Develop a formal method to understand current and potential stakeholder/funder needs regarding the role of education within the organization and assess the potential impact of significant changes.
3. Evaluate the current activities surrounding the organization's education initiatives and explore the possibilities for increased programming, master classes, etc.
4. Identify and cultivate strategic partnerships to assist with the educational mission of the organization.

[End of Plan]

STRATEGIC PLANNING LEADERSHIP COMMITTEE

Members of the Strategic Planning Leadership Committee who guided the plan process and content included the following members of the Cabaret staff and Board of Directors:

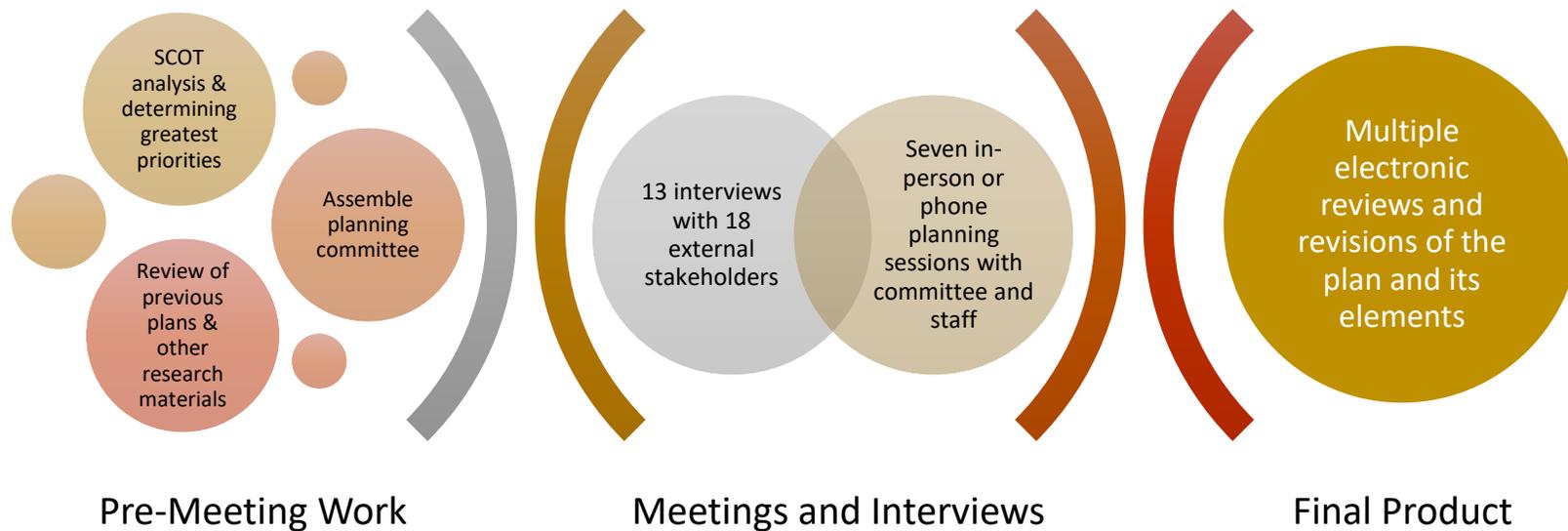
Deborah Balogh, Vice Chair, Board of Directors
Keri Brantley, Director of Development
Robert DeVoss, Chair, Board of Directors
Shannon Forsell, Artistic Director & CEO
Courtney Hardy, Artistic & Development Coordinator
Britnee King, Communications & Marketing Manager
Charles McCormick, Member, Board of Directors
Alicia Morales, Business Manager
Mark Szobody, Productions & Operations Director
Tim Alan Thompson, Audience & Artist Experience Manager
Joseph VandeBosche, Treasurer, Board of Directors
Martin Webb, Member, Board of Directors

Strategic counsel included:

Melanie Norton, CEO and Philanthropic Counsel, NPC
Karrie Zuccarello, Philanthropic Counsel, NPC

PLAN PROCESS, RESEARCH AND INFORMING MATERIALS

Development of the 2020-2024 strategic plan was an in-depth and robust process covering some nine months of preparatory and active planning work. The scope of work, planning schedule and resource materials were addressed in the early months of 2019 and the Strategic Planning Leadership Committee was assembled for its first conference call meeting on April 8. Highlights of the activities informing the plan included the following:



Individual and external stakeholders interviewed for the process included: Ron and Helmi Banta, David Barrett (Glick Industries), Gary Butkus, Marianne Glick, Bill Jenkins (Ball State University), Melynn Klaus (Christel DeHaan Family Foundation), Ronni Kloth (Lilly Endowment, Inc.), Brian Payne (CICF), Michael Pettry and John Mainella, Conrad Piccirillo, and Morgan Snyder (Visit Indy). Group interviews occurred for the Indianapolis Arts Council (Ernest Disney-Britton, Julie Goodman and Shannon Linker) and Indy Hub (Ashley Miser and Blake Johnson).

A preliminary review of the emerging plan and key elements was conducted during a special meeting of the Board of Directors on July 23 and presentation of the final plan will occur with the Executive Committee of the Board of Directors on October 22. Adoption of the plan is expected to occur at the regular meeting of the Board of Directors on November 19, 2019.

CONCLUSION

As is the case with all strategic plan processes, forging the path forward through an intentional plan is only the beginning of the story. Successful achievement of the vision, goals and objectives identified in any plan relies on strong execution. It is the experience of counsel that the most challenging and rewarding parts of the process are yet to come. Excitement and satisfaction build when a plan starts to come to life.

The plan created by the Strategic Planning Leadership Committee is designed to give the Cabaret's staff and Board of Directors a strong focus on the opportunities and challenges that will best equip the organization for long-term success. A good deal of work represented in this plan includes the creation of several ad-hoc or special committees. It is likely that additional prioritization will need to occur as the execution details are developed (initiative owners, timelines for achievement, additional tactics, etc.).

The Strategic Planning Leadership Committee, staff and Board should be commended for this meaningful work and the resulting plan. The Committee was willing to commit the time and deep analysis needed to produce an intentional plan pointed to the future vision. The planning process was particularly special in that it was impressively inclusive – the entire staff was invested in the process and plan content.

Perhaps the most special part of the plan process from the vantage point of counsel was the identification of The Cabaret's unique offering...the radical hospitality offered to those who grace its doors. This is the special ingredient – coupled with outstanding performance in a beautiful setting – that sets the organization apart from others and will foster patron loyalty and ensure a strong future.

Finally, it is important to again stress that execution of this plan will rely on meaningful assistance from the Board and others. This is not just a plan for the staff to carry forward; it is a plan for The Cabaret's future and all of those invested in its success.

Norton Philanthropic Counsel was honored to serve as a partner to The Cabaret in this important work.

Gratefully,



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