
TAC Strategic Planning

By Ward Fleri, San Diego Branch



“If you don't know where you are going, you might wind up someplace else.”

The great sage of baseball, Yogi Berra, summed up strategic planning with that quote. Likewise, when Lewis Carroll's Alice was wandering through Wonderland and reached a fork in the road, she asked the Cheshire Cat which road to take. The Cat replied, “If you don't know where you're going, any road will do.”

What is strategic planning?

Strategic planning is a process that involves assessing the current state of an organization and its “business” environment, developing a vision for its future state in 5 - 10 years, and then designing strategies with specific actions and milestones to move toward that future state.

Why strategic planning and why now?

For several years, the Executive Committee had planned to start a strategic planning process. This was partly motivated by the gradual decrease in membership. Regrettably, dealing with the financial fall-out of the \$250,000 CAN embezzlement put these plans on hold. After the 2020 AGM, the Executive Committee decided the time was right to start a strategic planning process.

Committee participants

For the initial phase of planning, sixteen members with considerable TAC experience were recruited: Alison Moen, Cheryl Durnin, David Booz, Don MacQueen, Eileen Hsu, Elinor Vandegrift, Ellen Sears, Fiona Miller, Geoffrey Selling, Gordon Robinson, Marjorie McLaughlin, Melissa Whitson, Robert McOwen, Tracey Applebee, Ward Fleri, and Mel Briscoe, who served as facilitator.

Several in this group decided not to continue to the subsequent phase due to other commitments or for the expressed recommendation of involving newer and/or younger members. The six new members who joined the team added helpful new perspectives. The list for Phase Two: Alison Moen, Charles Liu, Cheryl Durnin, Don MacQueen, Ellen Sears, Gael Forster, Geoffrey Selling, Gordon Robinson, Kathy Simonsen, Marion Hamilton, Marjorie McLaughlin, Melissa Whitson, Moira Korus, Robert McOwen, Tiffany Clede Howard, Tracey Applebee, and Ward Fleri.

TAC Mission Statement

To teach, inspire, and connect Scottish country dance teachers in North America and beyond.

Phase One – SWOT analysis

The planning process started in January 2021 with a SWOT analysis facilitated by Mel Briscoe to identify the Strengths, Weaknesses, Opportunities, and Threats that pertain to TAC at present and in the future. Items in the four categories were listed and prioritized. At a second meeting the group evaluated the

level of impact and difficulty of implementing the opportunities and mitigating the weaknesses, information that will be useful later in the planning process. This exercise was helpful in assessing the current state of TAC's internal operations and external environment.

Phase Two – Mission, Values, and Vision

The team for the second phase started meeting in June with Ward Fleri as leader and facilitator. The first priorities were to develop a mission statement, a values statement, and a vision statement for the approval of the membership. None of these currently exist for TAC, although there is a statement of TAC's objectives on the TAC home page. The team has met via Zoom every 3 or 4 weeks. Its first job was to develop a mission statement that succinctly expresses the purpose of TAC, i.e., its reason for being. Two versions were presented to the Executive Committee (EC) in August for comment. Its feedback was incorporated, resulting in a single statement that was approved by the EC in October.

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The Mission Statement is:

To teach, inspire, and connect Scottish country dance teachers in North America and beyond.

The following explanations and rationales will provide insights into the process involved in reaching this statement:

1. The Mission Statement should stand alone without requiring further explanation.
2. A shorter statement is more memorable than a longer one; using too many verbs can dilute the effectiveness of the statement.
3. The statement needs to be unique to TAC and not be applicable to other teacher organizations or to a branch.
4. The Mission Statement doesn't need to cover every element of TAC's activities; the objectives are a better place to elaborate and ensure broader coverage of activities.
5. The proposed statement appears to sufficiently cover all the activities noted in the proposed revised objectives.
6. The Mission Statement should avoid inclusion of aspirational activities if TAC is not firmly committed to working on them.
7. We emphasized teachers, so that dancers, musicians, and enthusiasts are not mentioned in the Mission Statement, but are included in the proposed revised TAC objectives.
8. Reference to musicians was not included because TAC is not an organization of musicians but of SCD teachers. While music is essential to the dance and TAC does provide a certain degree of support for musicians, this is not a primary activity for TAC. Most musicians are not TAC members because membership isn't of high value to a musician.
9. The explicit inclusion of the category of instructors was discussed and alternative labels for teachers were considered. Ultimately, it was agreed that using only the word "teacher" keeps the statement simple and is broad enough to cover anyone teaching SCD. It was pointed out that the instructor category is quite new and just beginning to be implemented, and additional categories may be developed by the RSCDS in the future.
10. The word "mentoring" was not included because it is implicit in the actions of teaching and inspiring: TAC currently has no recognizable mentoring program.
11. "beyond" means that we do have connections via TAC to teachers outside North America: 25% of the membership is from somewhere other than North America.
12. Concepts of teaching excellence and inclusivity were considered: we believe they are best addressed in the Objectives and/or Values Statement.



While examining TAC's mission and its purpose, it seemed appropriate and necessary to also review TAC's six stated objectives as an organization. A subcommittee of four team members produced a revised set of seven objectives. After discussion with the entire committee, the new set of organizational objectives was presented to the EC in October and earned its preliminary approval.

The proposed revised Objectives are:

- To train and support all levels of teachers and instructors of SCD within the RSCDS framework.
- To foster high quality teaching that supports individual dancers and all types of classes.
- To encourage involvement in Scotland's heritage of country dancing by promoting its learning, enjoyment, and sociability.

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- To make available and promote resources for reference and instruction, including dance descriptions and recorded music.
- To nurture the development of musicians for Scottish country dancing.
- To facilitate communication and relationships between dance teachers, instructors, supporters, organizations, and musicians.
- To archive and preserve, in an accessible form, TAC's history of supporting Scottish country dancing.

Development of a Values Statement is the committee's current focus. A Values Statement highlights an organization's core guiding principles and its philosophical ideals. It is used to both inform and guide the decisions and behaviours of the people inside the organization and to signal to external stakeholders what's important to the organization. We expect to present the Values Statement at the EC's November meeting.



Next steps

The next step is to develop a Vision Statement, starting at the committee's November meeting. This is a major element in the planning process since strategic objectives and goals should provide paths toward a vision for the future.

Once the Vision Statement is formulated, the next step will be to develop strategic objectives and short, medium, and long-term actions expressed as SMART (Specific, Measurable, Achievable, Result-oriented, and Time-bound) goals. Achieving these goals will require the participation of individuals beyond the EC and strategic planning committee. This overall process has the potential for developing a more engaged membership and a more vital organization.

The committee's goal is to have the strategic plan completed for membership approval at the 2022 AGM. Subsequent issues of TACTalk will include updates on the progress of the planning committee and approvals by the Executive Committee. An Area Reps meeting will be dedicated to the presentation and discussion of the plan. We anticipate holding one or two Zoom sessions in the spring for general discussion. Reactions to the current Mission Statement and TAC Objectives can be sent to Ward Fleri at sedir2@tac-rscds.org.

Candidate Class Update

by Gael Forster, Examinations Coordinator

Do you know anyone who is thinking about becoming a Teacher? Please encourage them to consider our RSCDS Teacher Candidate Courses and Exams for Units 2, 3, and 5 that will be offered in conjunction with TAC Summer School at Mount Royal University in Calgary, Alberta, Canada, from July 17 to 31, 2022.



All examination information is available on the RSCDS Web Site <https://www.rscds.org/learn/teacher-training/teaching-certificate>, including timelines for completion of Units 1 and 4, course application forms and costs, prescribed dances, etc. Note that the next opportunity for writing Unit 1 is Saturday, February 12, 2022, with deadline to apply 7 weeks before (which is December 25, 2021).

And don't forget about the Jubilee Scholarship Fund for potential financial assistance: <https://tac-rscds.org/index.php/teaching-courses/jubilee-scholarship>

Questions and requests for additional information may be directed to the TAC Examinations Coordinator, Gael Forster at tcc@tac-rscds.org.