

TAC Strategic Plan (5/11/2022)

Section I – Introduction

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

The great sage of baseball, Yogi Berra, summed up the essence for doing strategic planning with this 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 famously 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 five to ten 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 decrease in membership over the years. Regrettably, dealing with the financial fall-out of the embezzlement put these plans on hold until recently. 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, a group of 16 members were recruited. The group consisted of 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, Tracy 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 members who joined the team added helpful new perspectives. The list of participants for this second phase consists of 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.

Plan Components

In developing a plan to take TAC from its current state to a desired future state, the planning committee produced several important plan components. These include mission, values, and vision statements, as well as updated organizational objectives for TAC. To make the vision a reality, goal areas and their supporting strategic objectives were defined. These are described in detail in the following sections.

Potential Impact

As shown in the pages that follow, a significant effort will be required over the next five or six years to achieve all goals and objectives. Undoubtedly it will be necessary to revise the plan once its implementation starts, and it is possible that not all tasks can be completed by the end of 2028 as projected in the plan. But the actions described herein will help TAC to be a vital part of Scottish country dancing in North America and beyond. Its success can only be achieved if TAC members are willing to engage in its implementation.

Section II – The Strategic Planning Process

The planning process started in January 2021 with a SWOT analysis, facilitated by Mel Briscoe, to identify the **S**trengths, **W**eaknesses, **O**pportunities, and **T**hreats that pertain to TAC at present and in the future. Numerous items in each of the four categories were listed and prioritized by the group. At a second meeting the group evaluated the level of impact and difficulty of implementing the opportunities and mitigating the weaknesses. The information was used later to develop specific strategic objectives and actions. This entire exercise helped to assess the current state of TAC’s internal operations and external environment.

The team for the second phase started meeting in June 2021 with Ward Fleri as leader and facilitator. The initial priorities were to develop mission, values, and vision statements for the approval of the Executive Committee and the membership. At present, TAC has none of these, although a statement of objectives, created several years ago, is available on the TAC website home page. The team started meeting via Zoom every three or four weeks. Working through the summer and fall, the planning committee developed these statements and gained Executive Committee approval for each.

The third and final phase involved organizing all the great ideas generated from the SWOT analysis and from committee discussions of its vision for TAC’s future into a plan of action for the next five to six years. To initiate this phase, the committee categorized ideas into three broad goal areas – teacher development, finance and administration, and promotion of TAC and Scottish country dancing. Each of these areas was assigned to one of three subcommittees that were tasked with developing SMART strategic objectives. SMART stands for **S**pecific, **M**easurable, **A**chievable, **R**esult-oriented, and **T**ime-bound. Actions for implementing each strategic objective were also developed. In order to prioritize and schedule the actions within the overall plan, each was assessed for its level of ease or difficulty of implementation, its impact on members and the TAC, and its monetary requirements.

In the spring of 2022, the planning committee conducted a survey of current TAC members to help validate or modify its proposals, identify issues that may not have been recognized, and inform priorities for the goals and objectives. The team received a gratifying 126 responses to the simple three question survey. The team also reached out to non-member teachers to ascertain what services, events, or resources might inspire them to join TAC. As it turned out, the committee, in its own planning, had already captured many of the issues and concerns found

in both surveys. However, several ideas from the survey are listed in the Appendix, such as topics for master classes. The survey questions were as follows:

For Current TAC Members:

1. Why have you chosen to be a TAC member?
2. What services, events, or resources of TAC do you particularly value?
3. What additional supports and resources could the TAC offer you, particularly in your role as a Scottish country dance teacher, that would make the organization more valuable to you?

For Non-TAC Members:

1. Are you aware of the TAC as an organization and its work to promote Scottish country dancing and teaching in North America?
2. Have you ever been a member of TAC? If yes, why are you no longer a member?
3. What services, events, or resources could the TAC offer, particularly as you consider your role as a Scottish country dance teacher, that would make you want to join the organization?

Section III – TAC Plan Foundation: Mission, Values, and Vision

The goal of the Committee's effort was to generate a long-range plan that provides direction for the programs of TAC for the next six years. The first major step was to identify the Mission, Values, and Vision of TAC. Once drafted, the committee presented these to the Executive Committee for feedback and eventual approval.

Mission Statement

A mission statement answers the question "why do we exist – what is the purpose of our organization?" The mission statement developed by the committee is:

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

Among the factors considered by the committee in drafting this statement were:

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 separate proposed revised objectives provide elaboration and ensure broader coverage of activities.
5. The Mission 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 those activities.
7. The decision was made to emphasize the teachers; therefore dancers, musicians, and enthusiasts are not mentioned in the Mission Statement, but are included in the proposed revised TAC objectives.
8. No reference to musicians was ultimately 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, the latter is not a primary activity for TAC. Musicians generally are not TAC members because membership isn't of high value to a musician (who isn't also a dance teacher).
9. The RSCDS Core Training for Instructors (CTI) program is new and just beginning to be implemented. 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 whether or not they are certificated or an instructor. Additional categories may be developed by the RSCDS in the future. Keeping it simple by using only the word "teacher" was thought the preferable approach at this time.
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. "and beyond" means that TAC has connections with teachers outside North America; 25% of the membership is from somewhere other than North America.
12. Concepts of teaching excellence and inclusivity were considered but the committee decided these are best addressed in the objectives and/or Values Statement.

TAC Organizational Objectives

During this process of examining TAC's mission and its purpose, it seemed appropriate and necessary to also review TAC's six currently stated objectives as an organization. The 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.
- 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.

Values Statement

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 behaviors of the people inside the organization and to signal to others what is important to the organization. The Values Statement is as follows:

We value:

1. **The joy of Scottish Country Dancing.**
2. **Teaching Skills:** Training, mentoring, and lifelong learning that allows all teachers to lead instructive and enjoyable classes.
3. **Community:** A welcoming community that demonstrates respectful engagement, inclusivity, and sociability.
4. **Collaboration and Communication:** The cooperative and transparent exchange of information.
5. **Stewardship:** The preservation of the history of Scotland's dance and music and their continuing development as living traditions.
6. **Governance:** Effective and responsible leadership to ensure the success and future of the organization.
7. **Health and Safety:** Environments and practices that respect the well-being of participants and support their learning.

Vision Statement

A Vision Statement answers the questions "where are we going and why." It should describe a future state as if it already exists. It is the mountaintop for which we are striving. It is also useful to include the impact the vision will have. After several iterations within the planning committee, the following statement was submitted to and approved by the Executive Committee in January 2022:

By 2028, we envision a vibrant TAC that supports a thriving SCD community in North America through additional and diverse events, a sound financial foundation, and compelling membership value.

Section IV – Goals, Strategic Objectives, Actions, and Resources Needed

Based on these new Mission, Values, and Vision statements, and the organizational objectives, the planning committee developed long-term goals for TAC and then generated strategic objectives that would allow TAC to achieve those goals by the end of 2028. The committee

believes that each objective will have significant impact. Each objective was crafted using the SMART guideline. That is, the objectives are **S**pecific, **M**easurable, **A**ttainable, **R**esults-oriented, and **T**ime-bound. By meeting these criteria, progress against the objectives may be measured. The goal areas are:

Finance and Administration: Achieve financial strength, effective administration, and the use of enhanced technology through fundraising and expansion of leadership roles among the membership.

Teacher Development: Create a teacher development program that recruits and supports new teachers and offers growth and learning opportunities for experienced teachers at TAC’s Teacher Conference Weekend, Summer School, and during the year.

Promotion of Scottish country dancing and TAC: Increase the visibility of and participation in SCD and TAC in North America.

The following pages include the details of the planned goals, their underlying objectives, and actions. The abbreviations and codes used are summarized below.

<p>Abbreviations/Notes: Ad Com=Advertising Committee Arch Com=Archive Committee Ed Com = Education Committee Fund Com=Fundraising Committee Mem Com=Membership Committee SS=Summer School TAC EC=TAC Executive Committee TCW = Teachers Conference Weekend Tech Grp=Technology Working Group</p> <p>Degree of Difficulty Codes: C= Complex/lots of work/lots of networking required M= Mostly dependent on one or a few individuals E= Relatively easy</p>	<p>Impact Codes: H= Potentially Significant M= Moderate L= Small or Negligible</p> <p>Cost/Budget Implication Codes: \$\$\$= ≥\$5000 \$\$= \$500 - \$4999 \$= <\$500 0= \$0</p>
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GOAL AREA: Finance & Administration	STATEMENT: Achieve financial strength, effective administration, and use of enhanced technology through fundraising and expansion of leadership roles among the membership.			
OBJECTIVE NO. 1 Achieve financial strength and flexibility by December 31, 2028, with zero debt, \$50,000 available for strategic initiatives, and no reliance on upfront attendee deposits for funding.				
LEAD: Treasurer				
COMMITTEE(S) INVOLVED: Fund Com, TAC EC				
STRATEGIC ACTIONS	Completion Date	Responsible Entity	Cost	Degree of Difficulty
1.1 Establish fundraising committee.	9/30/22	TAC Treasurer and Chair	\$	M
1.2 Develop membership communication plan for ongoing and planned fundraising efforts.	12/31/22	Fund Com	\$ Potential cost for printing/mailling communication materials	M
1.3 Identify potential amounts to fundraise and targeted areas for spending.	3/31/23	Fund Com	0	C
1.4 Identify additional sources of funding.	6/30/23	Fund Com	\$\$ For professional experts	C
1.5 Develop fundraising plan.	9/30/23	Fund Com	\$\$	C
1.6 Establish sound financial controls and procedures for fundraising and for new events.	12/31/23	Treasurer, TAC EC, Fund Com	0	M
1.7 Obtain TAC EC approval for plan and budget.	12/31/23	Fund Com	0	E
1.8 Implement plan.	1/1/24 to begin; ongoing thru 2028	Fund Com	\$\$ For professional experts	C

1.1 Fundraising committee to be drawn mostly from outside TAC EC and potentially supported by professional experts.

1.4 Potential additional funding sources include grants, estate/legacy gifts, and multiyear donation commitments; may require hiring legal and marketing experts and development of specialized documents to support estate/legacy gift giving, multiyear donations.

1.5 Monies to be raised to be matched with specific purposes such as candidate scholarships, improved technology, etc.

1.5 Fundraising plan to include projected sources, dates, amounts and specifically address:

- debt elimination
- funding of “rainy day” reserves
- funding for strategic initiatives
- funding for key events so reliance on attendee deposits is avoided
- scholarships to fund full tuition for 4 young dancers and 2 musicians to attend each TAC SS
- scholarships to cover at least 50% of tuition for 16 teacher candidates

GOAL AREA: Finance & Administration		STATEMENT: Achieve financial strength, effective administration, and use of enhanced technology through fundraising and expansion of leadership roles among the membership.		
OBJECTIVE NO. 2 Incrementally through December 31, 2028, implement delivery platforms for programming, resources, and dancer/member communication tools that are secure, easy to use and maintain, and designed based on modern technology				
LEAD: Head of Technology Working Group				
COMMITTEE(S) INVOLVED: TAC EC, Tech Grp				
STRATEGIC ACTIONS	Completion Date	Responsible Entity	Cost	Degree of Difficulty
2.1 Establish technology working group.	12/31/22	TAC EC	\$ For outside experts	M
2.2 Conduct review of current technological capabilities versus needs/goals of key user groups.	6/30/23	Tech Grp	\$ For outside experts	C
2.3 Select technology needs that will be addressed.	12/31/23	Tech Grp	\$\$ For outside experts; plan development more labor intensive/costly than needs assessment	C
2.4 Create prioritized plan for technology change requirements.	3/31/24	Tech Grp	0	C
2.5 Obtain TAC EC approval for plan and budget.	6/30/24	Tech Grp	\$\$\$ Costs to acquire, install, and maintain new technology tools	E
2.6 Implement plan.	7/1/24 to begin; ongoing thru 2028	Tech Grp	\$ For outside experts	C

2.2 Key user groups include event organizers, TACBooks, TACSound, virtual program content developers, individuals involved in member communications, Facebook manager, website manager, and members. Consideration to be given to potential use of newer social media such as TikTok.

2.4 Technology plan to include estimated implementation timelines, costs, and effort requirements.

GOAL AREA: Finance & Administration	STATEMENT: Achieve financial strength, effective administration, and use of enhanced technology through fundraising and expansion of leadership roles among the membership.			
OBJECTIVE NO. 3 By January 31, 2025, reorganize the TAC Executive Committee responsibilities to support TAC’s strategic plans efficiently and effectively.				
LEAD: TAC Chair				
COMMITTEE(S) INVOLVED: TAC EC				
STRATEGIC ACTIONS	Completion Date	Responsible Entity	Cost	Degree of Difficulty
3.1 Review individual board member responsibilities and committees.	9/30/22	Chair, TAC EC	0	M
3.2 Investigate strategic alliances with other groups.	Begin by 1/31/23; future actions & dates TBD	TAC EC	0	M
3.3 Appoint leader to investigate deeper partnerships with the musician community.	1/31/25; future actions & dates TBD	TAC EC	0	E

3.1 Potential new responsibilities to consider include:

- teacher programming
- fundraising
- membership
- technology
- liaising with newer teachers
- volunteer manager/recruiter

3.2 New or expanded/strengthened alliances to be considered with:

- RSCDS
- International Branch
- Youth Branch

- other teacher organizations
- organizations supporting other dance forms

3.3 Musician leader to investigate:

- programs to support and develop musicians, including musician workshops and ways to encourage/support musicians who are just beginning to play for classes/dancing,
- how TAC may more actively engage with musicians
- ways to expand music available for SCD
- potential subsidization of costs of hiring musician for local dance events

GOAL AREA: Finance & Administration	STATEMENT: Achieve financial strength, effective administration, and use of enhanced technology through fundraising and expansion of leadership roles among the membership.			
OBJECTIVE NO. 4 Establish an easily accessible (as feasible) physical and digital archive of TAC-related materials by July 31, 2025.				
LEAD: Archivist				
COMMITTEE(S) INVOLVED: TAC EC, Arch Com, Tech Grp				
STRATEGIC ACTIONS	Completion Date	Responsible Entity	Cost	Degree of Difficulty
4.1 Appoint an archivist.	9/30/22	TAC EC	0	E
4.2 Establish Archive Committee.	3/31/23	TAC EC, Archivist	0	E
4.3 Review current state of archives and make recommendations for future state.	12/31/23	Arch Com	0	C
4.4 Obtain TAC EC approval for plan and budget.	3/31/24	Arch Com	0	E
4.5 Implement plan.	4/1/24 to begin; complete by 7/31/25	Arch Com, Tech Grp	\$\$\$ (may come under technology budget)	C

4.3 Scope of work to include:

- inventory of current state of archives
- evaluation of existing archival approach
- recommendations for future state of archives
- development of implementation plan for a freely available, user-friendly online portal with robust search capability and access to archived items (to extent feasible)

4.5 Potential costs to store archival materials and/or for technology tools that would provide search and access capabilities

GOAL AREA: Finance & Administration	STATEMENT: Achieve financial strength, effective administration, and use of enhanced technology through fundraising and expansion of leadership roles among the membership.			
OBJECTIVE NO. 5 Review business models of TACSound and TACBooks by December 2023; implement recommended changes by December 2025.				
LEADS: TACSound and TACBooks Managers				
COMMITTEE(S) INVOLVED: TAC EC, Tech Grp, appointed working group				
STRATEGIC ACTIONS	Completion Date	Responsible Entity	Cost	Degree of Difficulty
5.1 TACSound and TACBooks Managers to prepare reports of existing and expected future challenges for the shops.	12/31/22	TACSound and TACBooks Managers	0	E
5.2 TAC EC to appoint small working group to review the prepared reports and recommend potential changes to business models.	3/31/23	TAC EC	0	E
5.3 Working group to prepare recommendations for presentation to TAC EC.	9/30/23	Appointed working group; TACSound and TACBooks Managers; Tech Grp	0	M
5.4 TAC EC to approve recommendations.	12/31/23	TAC EC	0	E
5.5 Implement recommended changes.	1/1/24 to begin; completion date 12/31/25	TACSound and TACBooks Managers; possibly Tech Grp and/or TAC website manager or other appointed individuals	\$ to \$\$\$, depending on scope of changes	M/C Depending on scope of recommended changes

5.2 It may be beneficial to include a musician in the working group. Scope of review to include:

- Business trends
- Financial stability and financial challenges
- Challenges of existing business/operating models
- Expected challenges in the future
- Preliminary suggestions for potential changes, and to the extent known, the projected costs of those changes

5.3

1. Research may need to be conducted on how new-to-the-stores technology tools could be used for potential alternative delivery methods to purchasers of books and recorded music

2. Potential changes in business models to be assessed as to:

- potential incremental costs and savings
- expertise required to implement potential changes
- availability of funding to implement potential changes
- benefits to purchasers from changed business models and expected demand for new delivery options for recordings/books
- ease of administration by shop managers
- potential legal matters (cross-border licensing and taxation requirements, sharing of profits with musicians, etc.)

GOAL AREA: Teacher Development	STATEMENT: Create a teacher development program that recruits and supports new teachers and offers growth and learning opportunities for experienced teachers at TCW, SS and during the year			
OBJECTIVE NO. 1: Create, provide, and evaluate a mentorship program for new teachers by December 2026				
LEAD: Education and Training, Mentor trainer/program director				
COMMITTEE(S) INVOLVED: Education Committee				
STRATEGIC ACTIONS	Completion Date	Responsible Entity	Cost	Degree of Difficulty
1.1: Train mentors to remotely provide guidance and feedback to new teachers.	SS 2023 and continue to provide training each SS	Mentor trainer /program director	\$ Honorarium for appointed teacher	M but significant for mentor trainers
1.2: Offer a mentor/preceptor to teachers completing teacher training.	Beginning Sept 2023	Mentors	0 Volunteer position	M for mentors
1.3 Evaluate program by obtaining feedback from both the new teachers and the mentors.	Beginning Dec 2024	Mentor trainer/ program director	0	E for Mentor program trainer

1.1 Mentors to be teachers with at least 5 years of experience

1.2 Mentors/preceptors to provide guidance/feedback at least 4 time/year for first 3 years of mentee's teaching

1.3 Evaluation held annually for first three years

GOAL AREA: Teacher Development	STATEMENT: Create a teacher development program that recruits and supports new teachers and offers growth and learning opportunities for experienced teachers at TCW, SS and during the year			
OBJECTIVE NO.2: Provide opportunity for group discussion and support for new teachers beginning with those newly qualified in 2023 and continuing with each year's new cohort				
LEAD: Education and Training				
COMMITTEE(S) INVOLVED: Education Committee				
STRATEGIC ACTIONS	Completion Date	Responsible Entity	Cost	Degree of Difficulty
2.1: Establish a facilitator to organize group discussions/ meetings via Zoom for newly qualified teachers	SS 2023	Designated Facilitator	\$	M (facilitator)
2.2 Offer group discussion every 6 months for newly qualified teachers for up to 3 years following completion of teacher training.	SS 2023	Designated facilitator	0	M Minimal admin involved by facilitator to book meeting dates

2.2 Format could include a designated topic for half of each meeting with the rest of the time open to the group to ask questions or discuss topics and experiences important to them. Guest teachers could be invited by the facilitator to address topics of interest to the group
One topic suggestion is ensuring TAC resources are well known (TAC notes, Ask TAC, etc.) – “Welcome Package”

GOAL AREA: Teacher Development	STATEMENT: Create a teacher development program that recruits and supports new teachers and offers growth and learning opportunities for experienced teachers at TCW, SS and during the year			
OBJECTIVE NO. 3 By 2023, TAC will offer varied online growth and learning opportunities, with the focus on experienced teachers but open to all				
LEAD: Education and Training				
COMMITTEE(S) INVOLVED: Speakers' series, Tech Grp, Education Committee, Advertising Committee				
STRATEGIC ACTIONS	Completion Date	Responsible Entity	Cost	Degree of Difficulty
3.1 Devise curriculum and recruit facilitators for master classes.	September 2022 and ongoing	Speakers' Series lead	0	E-M
3.2 Create schedule and advertise master classes	November 2022	Speakers' Series lead; Ad Com	0	E
3.3 X times per year offer topical master classes via remote / zoom courses, with recordings saved in a digital library accessible through the TAC website.	March 2023 and ongoing	Tech Grp; Ad Com; Ed Com	\$	C
3.4 Solicit feedback, evaluate program, seek input on future content for master classes.	March 2024	Speakers' Series lead	0	E

A list of topics for online Master classes and discussion can be found in the Appendix.

GOAL AREA: Teacher Development	STATEMENT: Create a teacher development program that recruits and supports new teachers and offers growth and learning opportunities for experienced teachers at TCW, SS and during the year			
OBJECTIVE NO. 4 By 2024, TAC will offer varied growth and learning opportunities in-person , with the focus on experienced teachers and open to all				
LEAD: Education and Training				
COMMITTEE(S) INVOLVED: Workshop Committee, Events Director				
STRATEGIC ACTIONS	Completion Date	Responsible Entity	Cost	Degree of Difficulty
4.1 Approach local workshop hosts to augment existing events with a teaching focus session. Inventory events that use this model and use as pilot test case for 4.2.	December 2024	Separate workshop committee	\$\$	C
4.2 Develop regional teachers' weekends.	Fall 2025 (for 1 st event)	Additional Events Director & local area reps	\$\$-\$\$\$ / M	M

4.1 Session ideas similar to 5.1 list (See Appendix).

4.2 Regional teachers' weekends

- Hold one in fall, one in spring
- Move location around North America and keep separate from Summer School
- Include events for non-teaching local dancers such as a ball

GOAL AREA: Teacher Development	STATEMENT: Create a teacher development program that recruits and supports new teachers and offers growth and learning opportunities for experienced teachers at TCW, SS and during the year			
OBJECTIVE NO. 5 By 2024, increase participation to 33% of TAC membership [increase of 40% over the average attendance in 2017 to 2019] in annual TCW and SS teacher development activities and expand program offerings at TCW and SS				
LEAD: TCW Director and SE Director				
COMMITTEE(S) INVOLVED: Summer Events and proposed TAC EC lead				
STRATEGIC ACTIONS	Completion Date	Responsible Entity	Cost	Degree of Difficulty
5.1 Modify TCW format to allow broader range of activities and content [concurrent sessions, handouts, samplers, etc.]; record/post as appropriate	2024	TCW Dir	\$\$\$	C
5.2 Expand use of open to all afternoon session at SS for teacher/teaching focused discussion topics; record and post as appropriate.	2023		\$\$	C
5.3 Establish six-year rotation of teacher focused class offerings.	2022		\$\$	M
5.4 Survey attendees and members each year to plan for next year's content.	2022 And ongoing	SS, TCW Dir	\$	E

Ideas for Actions 5.1, 5.2, and 5.3 can be found in the Appendix

GOAL AREA: Teacher Development	STATEMENT: Create a teacher development program that recruits and supports new teachers and offers growth and learning opportunities for experienced teachers at TCW, SS and during the year			
OBJECTIVE NO. 6: By 2026, train 15 additional Fully Certificated North American Scottish country dance teachers and add 20 CTI instructors, through recruitment (particularly of younger teachers) and training support				
LEAD				
COMMITTEE(S) INVOLVED: Education Committee				
STRATEGIC ACTIONS	Completion Date	Responsible Entity	Cost	Degree of Difficulty
6.1 Offer an annual afternoon presentation/ discussion at SS in which training opportunities (CTI and TC 1-5) are simply and clearly presented	Beginning SS 2022	Appointed individual	\$	M Moderate for one individual
6.2 Offer a Basic Teaching Skills Course regularly	Beginning Summer 2023	Appointed individual	\$\$ honarium for appointed teacher, room costs and musician	M Significant effort for one individual
6.3 Offer an in-person CTI training <u>for trainers</u> at regular intervals, during SS or the TCW	Beginning SS 2022	Appointed individual	\$\$ 2-day honorarium and room	M Significant for trainer
6.4 Actively and repeatedly publicize the above offerings in the general SS and TCW announcements	Ongoing	Ad Com	\$ if color brochure	E
6.5 Offer one full scholarship for a teacher candidate between the ages of 18 and 35 to a teacher training course at SS	SS 2022	TAC Exec	\$\$ winner's tuition, room & board	Low to HIGH depending on TAC finances
6.6 Each member of the TAC EC to annually contact three teachers from outside their own dancing area to ask them to promote teacher training opportunities and invite of their own dancers to participate.	June 2022 / annual	TAC Exec	0	M
6.7 Devote an Area Rep meeting to focus on teacher recruitment, with the intent of having teachers in each area encourage likely individuals to participate in teacher training opportunities.	Immediate/ Annual	Area Rep Coordinator	0	E
6.8 Include an annual article in TACTalk to showcase successful ways to recruit new teachers.	Ongoing	TACTalk, Editor	0	M
6.9 Prepare a simple brief description of teacher training opportunities.	June 2022	Appointed individual	0	E

6.2 Basic Teaching skills could be offered every other year to alternate with Unit 2/3/5. Could be during TCW or during SS. The latter would be more applicable to those attendees and serve as a “taster” of what it is like.

6.5 Crowd sourcing or personal sponsoring was proposed for 2022 monies to support this

6.8 TACTalk editor to find authors each year to write about their success in recruiting dancers to become teachers; perhaps by giving individuals in their area chances to “try out” teacher roles by recapping a dance or helping a dancer on the side during or before/after class.

6.9 This handout could be printed and made available at workshops, day schools, and branch events, as well as being distributed electronically to all TAC members and Area Reps.

GOAL AREA: Promotion of SCD & TAC	STATEMENT: Increase the visibility of and participation in SCD and the TAC in North America			
OBJECTIVE NO. 1 By December 31, 2025, define a compelling rationale for membership, make it visible and used by TAC leaders.				
LEAD: Head of Membership Committee				
COMMITTEE(S) INVOLVED: Mem Com, TAC EC				
STRATEGIC ACTIONS	Completion Date	Responsible Entity	Cost	Degree of Difficulty
1.1 Establish a Membership Committee.	9/30/22	TAC EC	0	M
1.2 Define value proposition and membership strategies.	7/31/23	Mem Com	\$ May be printing/ mailing costs for communication materials	C
1.3 Obtain TAC EC approval for membership value proposition, related implementation plan and budget.	9/30/23	Mem Com	0	E
1.4 Implement plan	10/1/23 to begin; ongoing thru 2025	Mem Com	\$\$ Cost of potential discounts/member- ship perks	C

Notes

1.1 Membership committee to include members with marketing expertise.

1.2 Committee to:

- Develop strategies for attracting and retaining members,
- Strategize how to promote TAC events and membership benefits,
- Develop Welcome Package, outlining TAC membership benefits,
- Determine its audience and frequency of distribution,
- Formulate plan to communicate the value of membership.

1.4 Costs may be incurred if Welcome Package or other agreed membership benefits provide discounts to TAC events, TAC online classes, or purchases from TACSound or TACBooks, etc.

GOAL AREA: Promotion of SCD & TAC	STATEMENT: Increase the visibility of and participation in SCD and the TAC in North America			
OBJECTIVE NO. 2 Each year from 2023 to 2026, increase by 2-3 percentage points the proportion of under 35 dancers attending TAC events from approx. 10% [tbd on 2019 and 2022 average] ¹				
LEAD: SE Director; Youth Committee Chair				
COMMITTEE(S) INVOLVED: Youth Committee, Summer Events, Education Com ²				
STRATEGIC ACTIONS	Completion Date	Responsible Entity	Cost	Degree of Difficulty
2.1 Reduce barriers for participation in TAC Summer School, for example, reduce tuition for younger dancers.		SE director and treasurer	\$\$ / L	E
2.2 Run a Youth Class at Summer School.	July 2026	SE Director	\$\$ / M	M
2.3 Create an annual Youth Weekend North America.	January 2028	Youth; TAC treasurer	\$\$-\$\$\$ / H	M-H
2.4 Establish SCD competition events for dancers, similar to the Newcastle Festival.	Spring 2028	Youth; Ed Com	\$\$\$	C

Notes:

1. Approximately 20 of the 179 (11%) participants at Summer School in 2019 were 35 or under (age is not an element of the application). Offering a discount rate for the 35 and under would provide more data on the proportion of younger participants. An increase of 2-3% each year would lead to 32-40 participants and would be a good number for a youth class.
2. A commitment to increasing the participation of young people in SCD and in TAC more specifically, requires creation of a focused Youth Committee.

GOAL AREA: Promotion of SCD & TAC	STATEMENT: Increase the visibility of and participation in SCD and the TAC in North America			
OBJECTIVE NO. 3 Develop a Winter School by 2027 to increase opportunities to participate in TAC events ¹				
LEAD: Schools Director; Treasurer				
COMMITTEE(S) INVOLVED: Education Committee; Summer Events / Schools Committee				
STRATEGIC ACTIONS	Completion Date	Responsible Entity	Cost	Degree of Difficulty
3.1 Conduct market research to evaluate interest, price point, ideal date, and potential locations. ²	September 2025	Schools Committee		M
3.2 Run first Winter School ³	Winter [Feb/March] 2027	Schools Committee and Schools director	\$\$\$	M-C

Notes:

1. The timing of TAC Summer School discourages some dancers from joining TAC because they prefer to participate in events closer to home; creating a new event at a different time of year can provide an additional reason for people to join TAC
2. It makes sense for Winter School and Summer School to be overseen by the same committee, perhaps renaming the committee “Schools Committee” and its chair “Schools Director.”
3. Since there are a number of events around the world, it is essential to distinguish TAC Winter School in some way; turning it into a “luxury” event may be a selling feature

GOAL AREA: Promotion of SCD & TAC	STATEMENT: Increase the visibility of and participation in SCD and the TAC in North America			
OBJECTIVE NO. 4 By September 2024 place an online information hub on the TAC website for SCD events and resources in NA.				
LEAD: Area rep. coordinator; TAC website lead				
COMMITTEE(S) INVOLVED: Area reps				
STRATEGIC ACTIONS	Completion Date	Responsible Entity	Cost	Degree of Difficulty
4.1 Establish a working group to determine the scope of the information hub.		Area Rep-Outreach lead on TAC Board, TAC website lead, at least one other board member; – information provided by area reps	0 / L	E
4.2 Create and maintain lists	Sept 2024	Area reps; Area rep lead; website lead	0 / M	E
4.3 Develop newsfeed to keep members informed	Sept 2024	Appointed individual	0	M

Notes:

- Area reps could be the providers of the information to the website lead(s) as they have knowledge of their specific regions
- Several different information lists are possible; some may be public; others could be for members only (such as a list of NA tutors and examiners)
- Lists could potentially include classes (when, where, cost, levels); branches or groups with demonstration teams; teachers who are willing to teach classes at community events, musicians available to play (and their home locations)
- The working group to determine what types of information to collect and best methods for communication of information from area reps to the website lead(s)
- The information on the website MUST be kept up to date
- 4.3 could be done in conjunction with Item 1.2 under Finance & Administration.

Section V – Implementation and Monitoring

Without implementation and monitoring, this plan becomes a document that simply takes up space and accumulates dust. To make this plan a reality, it needs the support of the TAC Executive Committee and, more importantly, the support and engagement of TAC members. There are many components to this plan, and there are many opportunities for TAC members to participate. The plan envisions the creation of several new committees to implement and oversee the various activities. The Executive Committee will have the responsibility of driving and monitoring the strategic objectives. Progress will need to be monitored at least quarterly, with a reporting mechanism to be established by the Executive. Reports of progress will be included in the quarterly TACTalk issues and included in the annual report to membership sent prior to the Annual General Meeting.

Many of the plan's action will require significant funding, which is why the plan includes several fundraising goals. While TAC members have been very generous in their financial support in the past, the plan includes activities to explore and acquire other sources of funding.

The planning committee believes that the goals, objectives, and actions described in this document will enable TAC and Scottish country dancing in North America to be vibrant, growing, and fun.

APPENDIX

Lists of topics and ideas for Teacher Development Objectives 3 and 5

Objective 3: *By 2023, TAC will offer varied online growth and learning opportunities, with the focus on experienced teachers and open to all.*

3.1 Devise curriculum and recruit facilitators for master classes

List of topics for online Master classes and discussions:

- How to organize a workshop
- Lesson planning how-to
- Which formations to teach in what order
- Ideas as to how they progress through teaching the various steps & formations
- How to choose dances to teach beyond just looking at programmes coming up and slotting those in to prepare people to go
- How to plan your teaching differently for different levels/abilities, or when teaching a workshop
- Model lessons for such things as:
 - Leading SCD at weddings, ceilidhs
 - An “open house” for new folks to try SCD
 - Classes for families with children
 - Classes for senior citizens (i.e., mobility issues and slower mental processing times)
 - Very small groups (five or less)
 - Social class for mixed levels of beginner through very experienced
 - Challenge class for high energy dancers
 - Challenge class for dancers with high mental energy but not so high energy bodies
 - Workshops
 - Tips to help if asked to be a workshop teacher
- Updates on advances in technology and how to implement it to be more efficient
- Starting new groups or class
- Retaining members
- Sharing of ideas on reaching out to younger dancers, sustaining participation of younger dancers
- Review teaching steps to beginners
- Fun drills to music for learning steps
- Explanations of the different types of music, how to choose music for beginners
- Using technology to plan lessons and music
- How to organize your music collection
- Ideas for exercises that really work for some of the more difficult formations
- Tricky step transitions
- Music and instructions for warm-ups & cool-downs
- Ideas to help correct steps

- Techniques for easing older dancers out of "walking" and into "dancing"
- Approaches to raising the standard of dancing, how to formulate, approach and sustain a "challenge" class for those dancers who aspire to improving technique
- How to devise a suitable dance programme - that works well for the musicians
- Discussion about how to support teachers who are teaching alone in their area

Objective 5: *Increase participation by 2024 to 33% of TAC membership [increase of 40% over the average attendance in 2017 to 2019] in annual TCW and SS teacher development activities and expand program offerings at TCW and SS*

5.1 Modify TCW format to allow broader range of activities and content [concurrent sessions, handouts, samplers, etc] and record/post as appropriate

TCW in-person ideas:

- Dance database lesson planning
- Personal critique on teaching; peer to peer work;
- Networking time
- Teacher and musicians working together course
- Elements of a successful class and how to run a successful class
- Warm ups and cool downs – what to do, what not to do
- Effective class management
- Use of voice
- Collaborating with other teachers to plan and lead classes
- Problem solving for social interactions – the talkative class, the over-helpful dancer, dancers trying to teach within their sets...
- Teaching for multiple senses – eyes, ears, etc.
- Accommodating the various learning styles of dancers
- Building memory skills in dancers
- Dealing with mixed level classes
- Using technology for music
- Understand differences in recordings by different bands for same dance and select style that will improve dancers' enjoyment [try the options to feel it]
- Technique refresher class
- Tips to help if asked to be a workshop teacher

5.2 Expand use of the afternoons at SS for teacher/teaching focused discussion topics and record and post as appropriate. Should be open to all since this might function like a "taster."

Summer School afternoon ideas:

- MC role
- Dance programs considerations
- Briefing refresher
- Teacher discernment and qualifications routes options - annually
- Working with musicians in a class or a workshop or for a social event

- Understanding the basics of music; effective use of music in classes; considerations when choosing music for use in classes
- Resources available through TAC

5.3 Establish a six-year rotation of courses offered: how to teach DAA; how to tutor; how to teach the medals test, and other in-person/in-depth learning

Courses to include in the cycle:

- How to teach DAA
- How to tutor
- How to teach medals test
- Basic Teaching skills [2 days] – alternate years
- CTI training for trainers [2 days; about 6 hours] – alternate years
- Units 2/3 & 5
- How to mentor new teachers {for 1.1}