

# TAC Strategic Planning Process

Area Representatives Meeting

24 April 2022

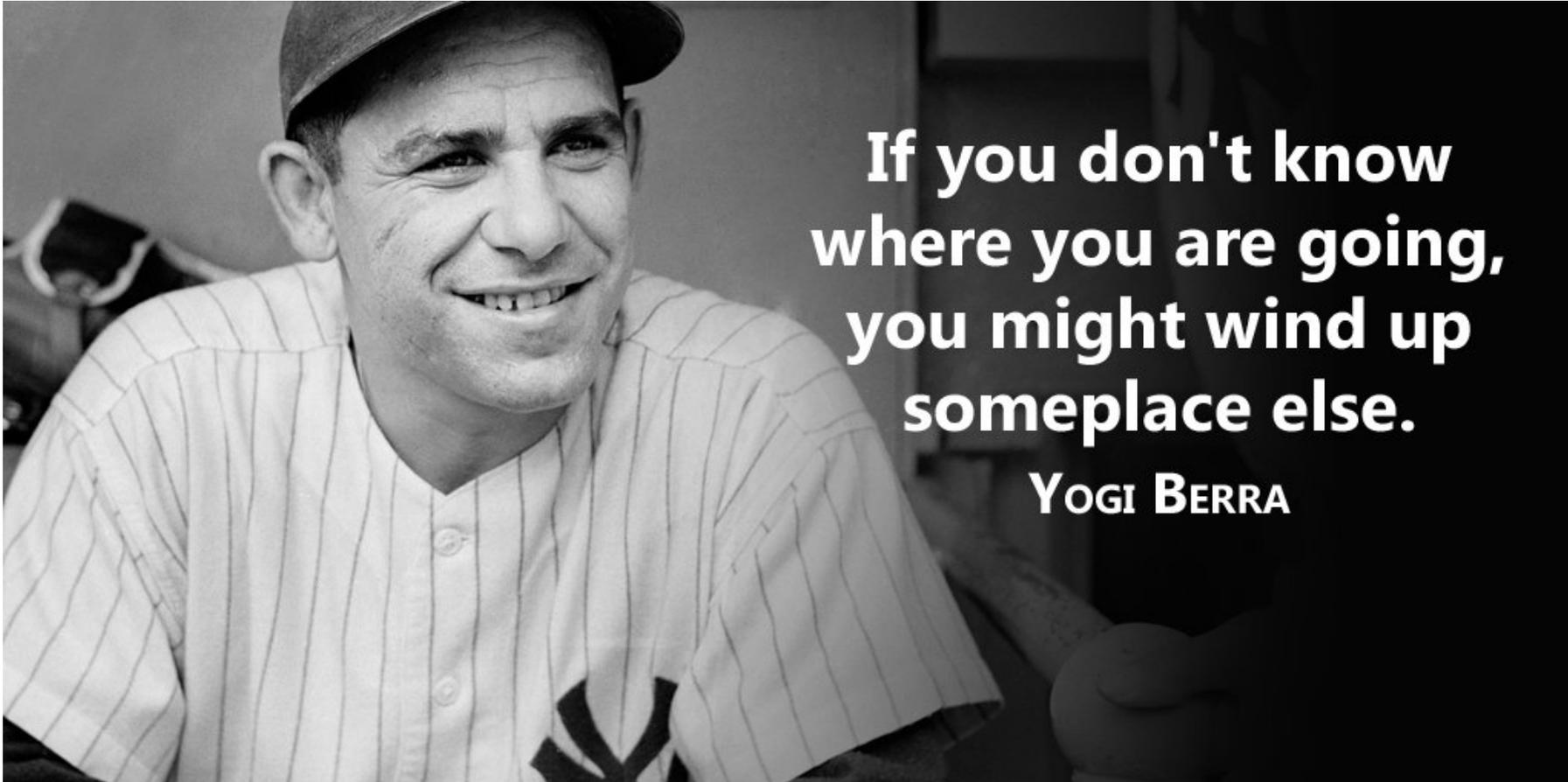
By

Ward Fleri

San Diego Branch



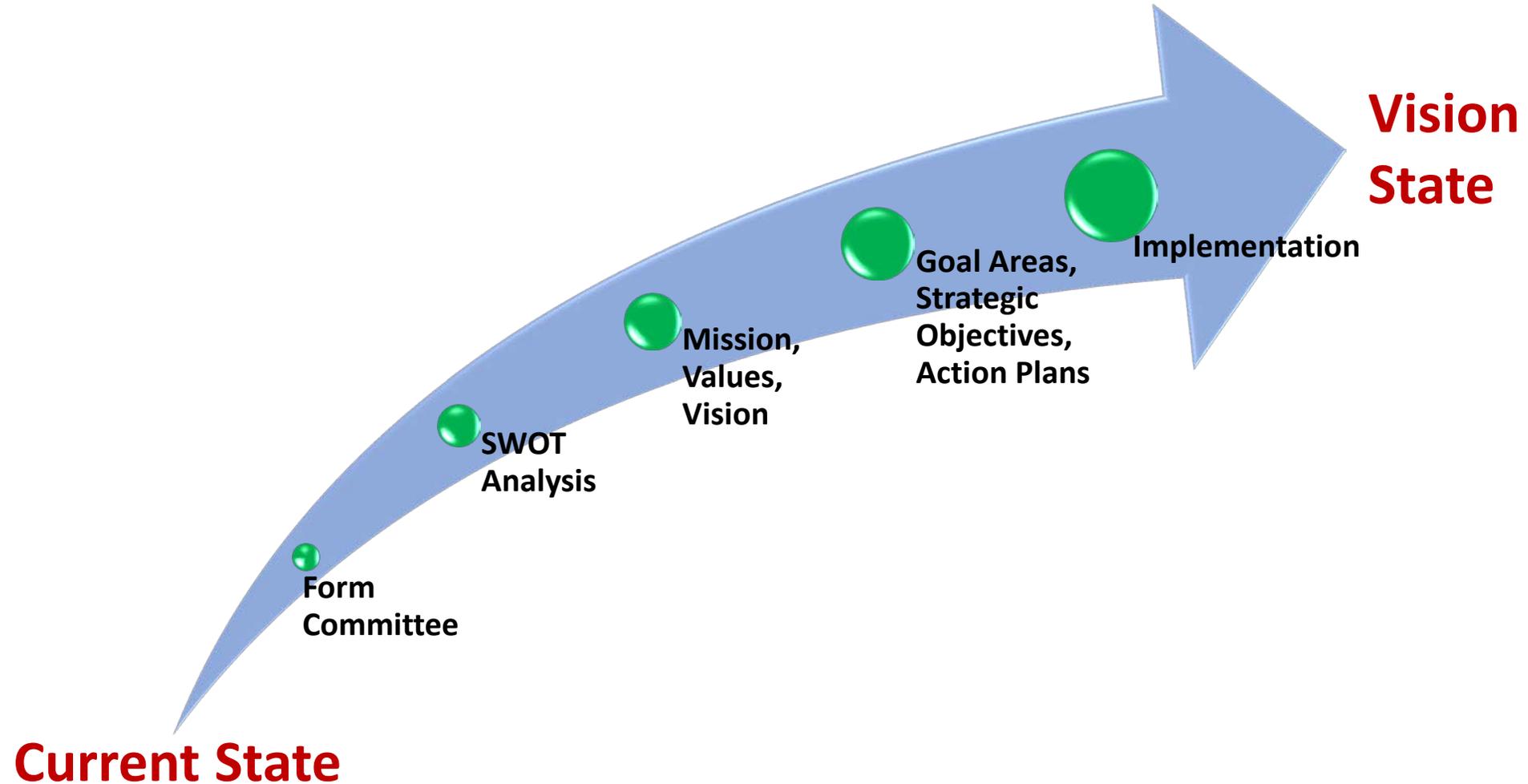
# Why strategic planning?



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

**YOGI BERRA**

# Strategic Planning Process



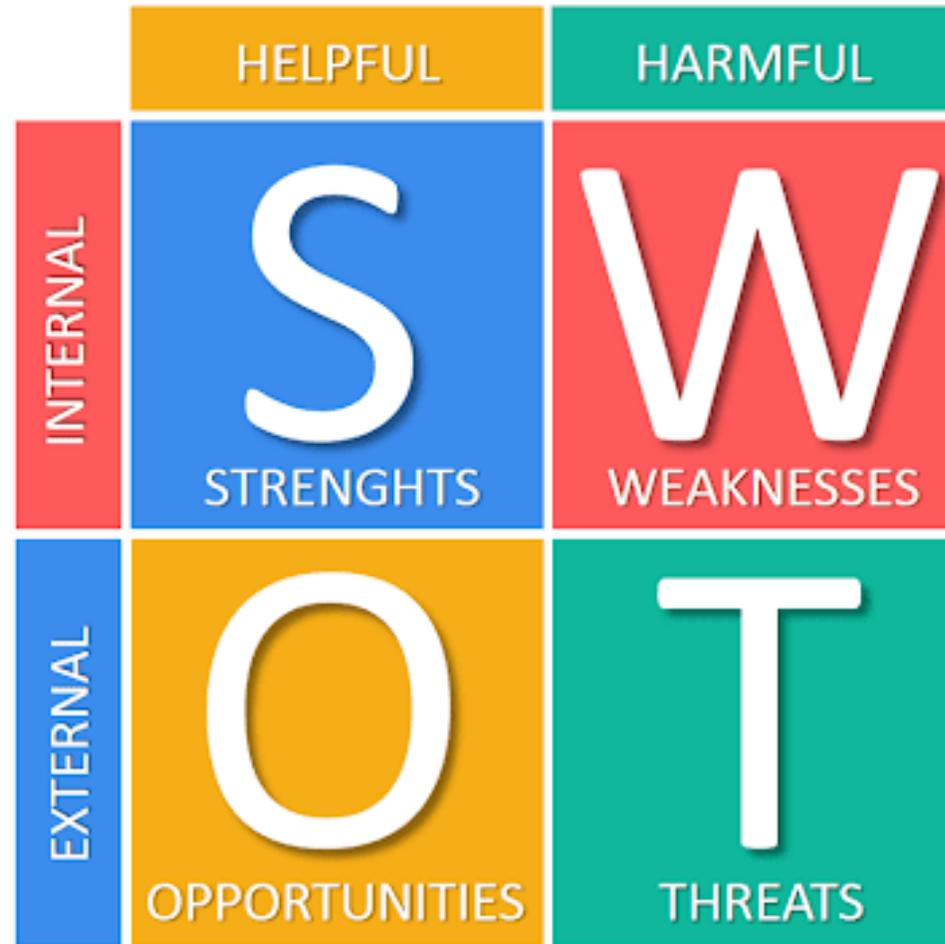


# Why Now?

- Declining membership
- Aging membership
- Financial challenges
- Keeping TAC healthy, vibrant, and relevant for another 60 years



# SWOT Analysis



# Committee Participants

SWOT Committee		Planning Committee	
Cheryl Durnin	Alison Moen	Cheryl Durnin	Charles Liu
Don MacQueen	David Booz	Don MacQueen	Gael Forster
Ellen Sears	Eileen Hsu	Ellen Sears	Kathy Simonsen
Geoffrey Selling	Elinor Vandegrift	Geoffrey Selling	Marion Hamilton
Gordon Robinson	Fiona Miller	Gordon Robinson	Moira Korus
Marjorie McLaughlin	Mel Briscoe	Marjorie McLaughlin	Tiffany Howard
Melissa Whitson		Melissa Whitson	
Robert McOwen		Robert McOwen	
Tracy Applebee		Tracy Applebee	
Ward Fleri		Ward Fleri	

# Mission, Values, Vision

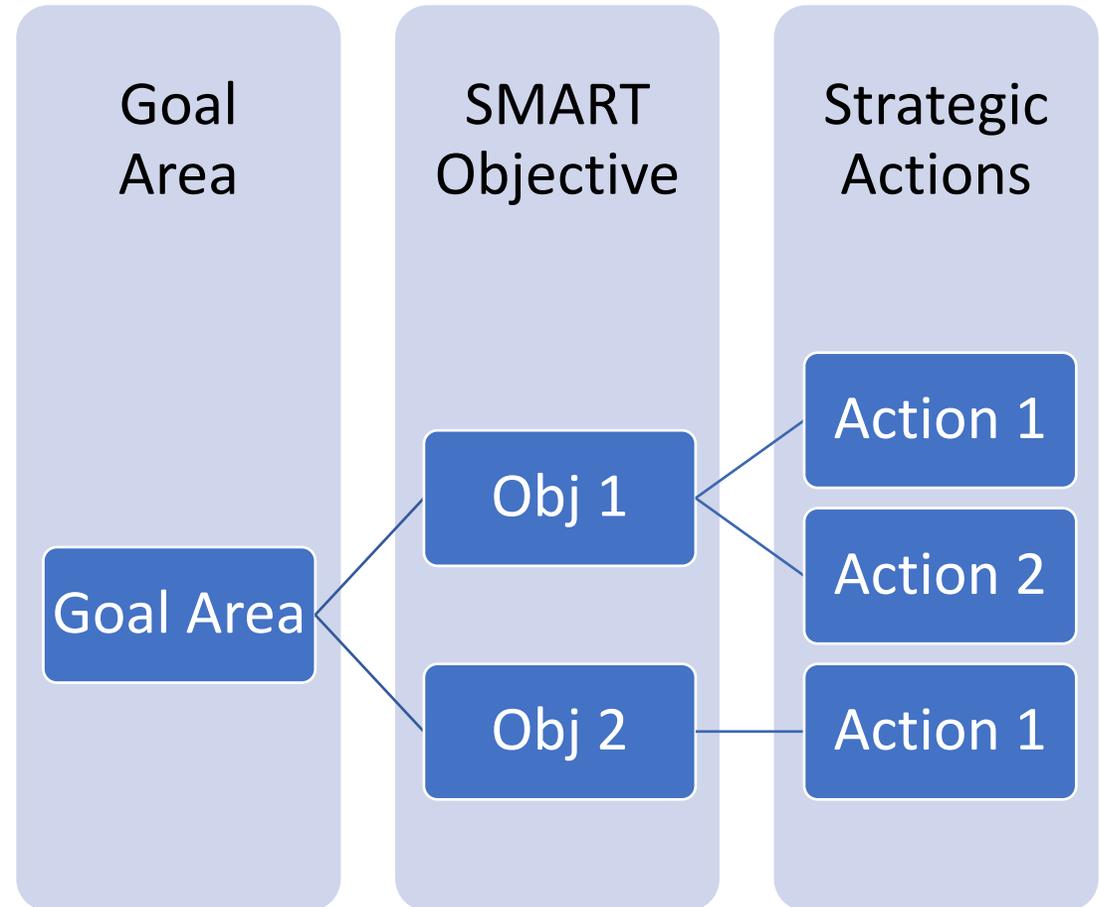
- Mission statement – Answers “why do we exist?” “What is the purpose of TAC?”
  - Succinct, stand on its own, unique
- Values statement – highlights TAC’s core guiding principles and philosophical ideals
  - Informs and guides decisions
- Vision statement – Answers “where are we going and why?”
  - It is the mountain top for which we are striving

# Plan Structure

## Goal Areas

- Teacher Development
- Finance & Administration
- Promotion of TAC and SCD

Specific  
Measurable  
Achievable  
Result-oriented  
Time-bound





# Mission Statement

A mission statement answers the question “why do we exist – what is the purpose of our organization?”

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

# TAC Organizational Objectives Revisited

1. To train and support all levels of teachers and instructors of SCD within the RSCDS framework.
2. To foster high quality teaching that supports individual dancers and all types of classes.
3. To encourage involvement in Scotland's heritage of country dancing by promoting its learning, enjoyment, and sociability.
4. To make available and promote resources for reference and instruction, including dance descriptions and recorded music.
5. To nurture the development of musicians for Scottish country dancing.
6. To facilitate communication and relationships between dance teachers, instructors, supporters, organizations, and musicians.
7. To archive and preserve, in an accessible form, TAC's history of supporting Scottish country dancing.

# Values Statement

## 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.”

**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.**



# Three Goal Areas

## **Finance & 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 TCW, SS, and during the year

## **Promotion of SCD and TAC**

Increase the visibility of and participation in SCD and the TAC in North America

# Finance and Administration

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

SMART Objective	Committees Involved
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.	Fundraising Committee, TAC Exec
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	TAC Exec, Tech Group
3. By January 31, 2025, reorganize the TAC Executive Committee responsibilities to support TAC's strategic plans efficiently and effectively.	TAC Exec
4. Establish an easily accessible (as feasible) physical and digital archive of TAC-related materials by July 31, 2025.	TAC Exec, Archive Committee, Tech Group

# Ex: 4. Establish an easily accessible (as feasible) physical and digital archive of TAC-related materials by July 31, 2025.

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	\$\$\$	C

# 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

SMART Objective	Committees Involved
1. Create, provide, and evaluate a mentorship program for new teachers by December 2026	Education Committee
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	Education Committee
3. By 2023, TAC will offer varied <b>online</b> growth and learning opportunities, with the focus on experienced teachers but open to all	Speakers series, Tech Group, Ed Com, Ad Com
4. By 2024, TAC will offer varied growth and learning opportunities <b>in-person</b> , with the focus on experienced teachers and open to all	Workshop Committee, Events Director
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	TCW Director and SE Director
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	Education Committee

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

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

# Promotion of SCD and TAC

Statement: Increase the visibility of and participation in SCD and the TAC in North America

<b>SMART Objective</b>	<b>Committees Involved</b>
1. By December 31, 2025, define a compelling rationale for membership, make it visible and used by TAC leaders.	Membership Committee, TAC Exec
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]	SE Director; Youth Committee Chair
3. Develop a Winter School by 2027 to increase opportunities to participate in TAC events	Education Comm, Summer Events/School Comm
4. By September 2024 place an online information hub on the TAC website for SCD events and resources in NA	Area Reps

Ex: 1. By 12/31/25, define a compelling rationale for membership, make it visible and used by TAC leaders

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 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

# Non-member Survey

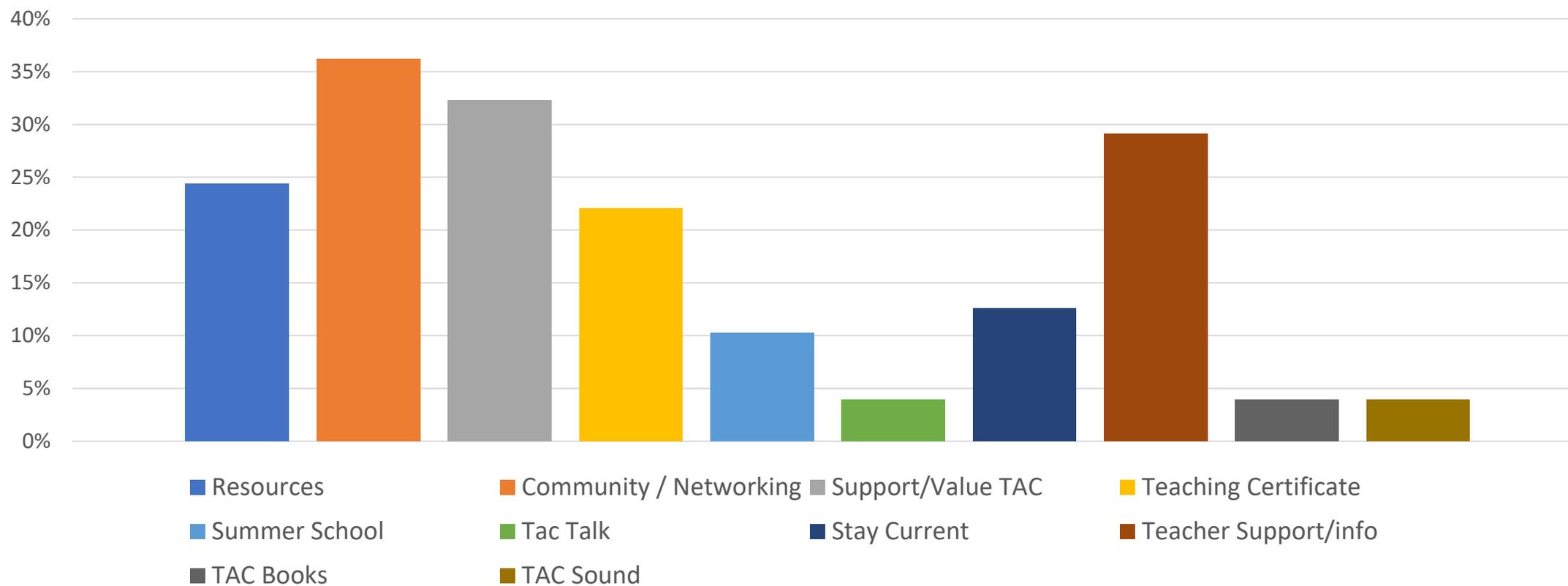
1. Are you aware of the TAC as an organization and its work to promote Scottish country dancing and teaching in North America?
2. Have you ever been a member of TAC? If yes, why are you no longer a member?
3. What supports, events or resources could the TAC offer, particularly as you consider your role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

# TAC Member Survey

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?

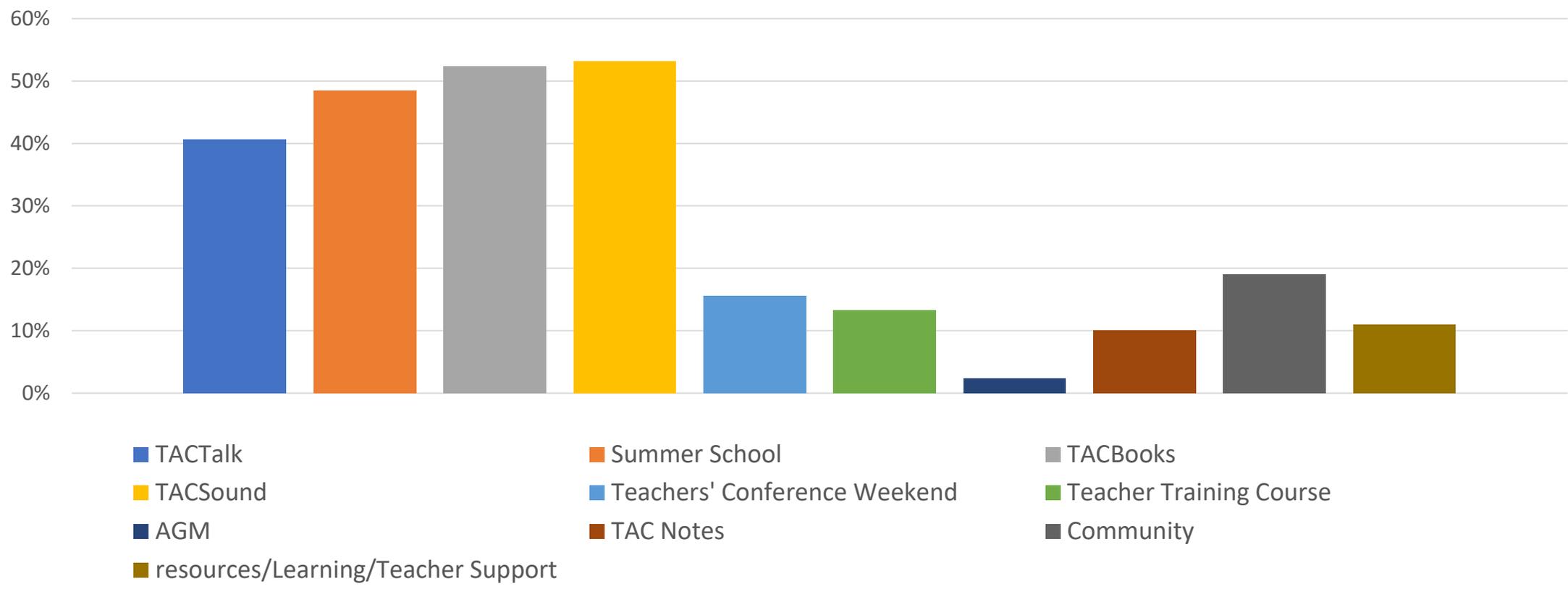
# 1. Why have you chosen to be a TAC member?

Why have you chosen to be a TAC Member?



# 2. What services, events or resources of TAC do you particularly value?

What Do You Value from TAC?



# TAC Member Survey

## Word Cloud Summary

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?



# Next Steps

- Hold one or two Zoom calls with general membership in May
- Present the penultimate version of the plan to the TAC Exec for approval on May 15
- Make detailed plan available to the membership in June
- Present the report of the strategic planning committee at the July AGM for approval
- Start implementation in August



Questions?