



Strategic Plan 2010-2016

Crafting the Future of the Arts in the South

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Introduction

South Arts, formerly the Southern Arts Federation, has a unique perspective to respond to the needs and opportunities of the entire nine-state region, and to demonstrate the ability of the arts to help meet regional challenges and opportunities. We rely on strong partnerships and collaborations, both public and private, to support our work and extend our resources, to maintain awareness of current trends and issues, and to make the arts accessible to the people of our region.

This plan, rooted in the potential of a rich and diverse region, emerges at a time when the arts will be called upon to form bridges to a changing society. This is a time of flux, influenced by arts-driven industries, entertainment and information networks. The arts in the South have a responsibility to inspire imagination, hope and opportunity.

South Arts History

South Arts, a nonprofit regional arts organization, was founded in 1975 to build on the South's unique heritage and enhance the public value of the arts. South Arts' work responds to the arts environment and cultural trends with a regional perspective. South Arts offers an annual portfolio of activities designed to address arts-related issues important to our region and to link the South with the nation and the world through the arts. The organization works in partnership with the nine state arts agencies of **Alabama, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, South Carolina** and **Tennessee**. South Arts is funded by the National Endowment for the Arts (NEA), foundations, corporations, individuals and member states.

The U.S. Regional Arts Organizations

South Arts is one of the six non-profit Regional Arts Organizations, entities created to encourage development of the arts and to support arts programs on a regional basis. Partially funded by the NEA, these organizations, which include Arts Midwest, Mid-America Arts Alliance, Mid Atlantic Arts Foundation, New England Foundation for the Arts, South Arts, and Western States Arts Federation, provide technical assistance to their member state arts agencies, support and promote artists and arts organizations, and develop and manage arts initiatives on local, regional, national and international levels.

The arts are integral to the robust economic, social, cultural and educational vitality of the South.

The development of regional organizations was encouraged in 1973 by the National Endowment for the Arts' (NEA) House reauthorizing committee, which stated its belief that:

Cooperation among states in their activities to support the arts can significantly serve the purposes of this act... It is felt that the regional approach would better serve the cultural needs of the people in many areas by allowing the full utilization of the resources of several states to be brought to bear where special needs exist.

Executive Summary

The arts are integral to the robust economic, social, cultural and educational vitality of the South. That belief guides the activities of South Arts, which has a mission to:

- Advance excellence in the arts
- Connect the arts to key state and national policies
- Nurture a vibrant quality of life

In 2009, with 35 years of past success and a new decade approaching, South Arts undertook a comprehensive strategic planning process to evaluate its direction and establish goals for the next several years. The resulting Strategic Plan will serve as an active planning and evaluation tool that will guide the organization's annual portfolio of activities. With this tool, South Arts can be more nimble and responsive to opportunities while maintaining a targeted focus on long-term goals.

At the heart of the South Arts Strategic Plan are five interrelated strategic goals. Each goal is supported by specific strategies.

Goal 1: The arts positively impact regional issues.

South Arts is uniquely suited to identifying regional needs and designing programs and services to help build and sustain the arts. By becoming an advocate for high priority focus areas – what we call a Smart Agenda – South Arts can assume a leadership role in regional policy discussions and decision making.

- Identify relevant cultural, educational, political, social and economic issues
- Develop new broad-scale initiatives that contribute to and are recognized as important to the health and vitality of the region

Goal 2: Dialogue and collective action with strategic allies brings about progress on key agenda issues.

The power of convening lies in the convergence of setting the agenda; drawing together those with valuable information, perspective and influence; and using gatherings – in-person and virtual – to provide opportunities for networking, dialogue, learning and action to address issues.

The success of the South Arts Strategic Plan will rest in large part on strategic alliances with an expanding circle of public and private entities. Three key groups of allies are our member State Arts Agencies, the National Endowment for the Arts, and public and private leadership organizations in the region. The need for mutually beneficial strategic partnerships and alliances is evident in each of the goals and will lead to a stronger South Arts and a stronger region.

- Organize conferences, summits, workshops and seminars to enlist and broaden the constituency on agenda issues
- Increase knowledge and effectiveness within the regional arts constituency

Goal 3: Pertinent information and research is more accessible and usable to the region.

Those working in the arts will be strengthened by having greater ability to make information-based decisions, and will be able to learn through demonstration projects, models and

innovation. South Arts can play a key role by filtering and contextualizing existing and new information with a regional and an arts perspective. Ready access to data and analysis related to arts education, economic trends and creative economies, arts participation, social engagement, and the use of social media is particularly crucial in advocating for the arts.

- Make information accessible to inform decisions and actions
- Understand and improve the region's standing in key agenda areas
- Initiate research to develop new knowledge
- Provide and encourage the use of best practices to arts constituents to strengthen their work

Goal 4: Increased opportunities and resources exist to extend the arts of the South within and beyond the regional borders, and to attract the arts of the world to the South.

As a regional arts organization we have a unique opportunity to make visible the authentic, comprehensive nature of Southern arts. Simultaneously, those in our region should have the chance to experience the best of American and world culture in their own communities, in ways that build deeper understanding of others and of the artforms.

- Highlight and promote the full range and diversity of artistic expression, both traditional and new/contemporary, in the region
- Increase opportunities and resources from public and private sources
- Deliver timely and relevant arts programs and services that meet the needs of the region
- Increase national and international markets for the arts of the region
- Make arts from across the country and around the world accessible to the people of the South

Goal 5: Effective management and governance practices ensure our organization's stability.

South Arts has strong federal and state partners, but these partnerships have created a high level of dependence on public funding. We have a responsibility to expand our partnership base, both to attract investment by a broader range of public and private entities and to expand our communications and service networks.

- Sustain an effective staff and board to be successful in carrying out this strategic plan
- Develop a financial master plan
- Strengthen communications through a multi-year master plan
- Ensure that South Arts provides value and benefit for its member state arts agencies
- Ensure accountability and guide decision-making through evaluation and reflection

A Mission of Impact

South Arts strengthens the South through advancing excellence in the arts, connecting the arts to key state and national policies and nurturing a vibrant quality of life.

A Vision of Progress

The South is a thriving region in the U.S. with the arts integral to its vitality.

An Identity Rooted in the South

Building a better South through the arts

We Value:

- The uniqueness of Southern culture
- Support for both the traditional and the evolving contemporary arts in our region
- The interconnectedness of the arts and Southern life
- Public and private arts funding
- Accessibility to the arts throughout the South
- Arts education and lifelong learning
- Decisions informed by a keen awareness of regional concerns including rural and urban distinction, race and poverty
- Inclusiveness and diversity in our work
- An arts ecology that includes private, commercial, public and community-based organizations

The Strategic Plan

This Strategic Plan is intended to be an active and vital positioning tool for South Arts through 2016. Aware of the changing nature of our region and our field, the objectives and strategies we present here will drive the development and evaluation of **an annual portfolio of activities** to respond to immediate and foreseeable opportunities. This approach, allowing us to be more nimble, opportunistic and responsive, will ensure we constantly maintain a targeted focus on moving the agenda forward, creating value through our work, and managing signature programs. At the three-year point (2013), a formal reflection and evaluation of the work completed, and necessary revisions to the plan, will allow us to maintain momentum toward our five goals.

The Plan presents five Strategic Goals which are interrelated. Each Goal can lead into, follow through on, or inform each of the others.

Smart Agenda

The plan also introduces our Smart Agenda, which is defined as a list of high priority focus areas that will guide/form the basis of the work of South Arts in the next six years. South Arts will assume a leadership role to push this as the arts agenda for the region. As a cultural organization with a Southern focus, South Arts has a responsibility to address issues and barriers to arts participation and development both in general and those specific to our region.

Three Filters

During the strategic planning process, South Arts defined three filters to serve as guidelines in evaluating programs and services. All continuing and proposed new programs/services will be tested against these filters. If they meet all three successfully, they will move forward to the next level of review.



Strategic Alliances

The success of this plan will rest in large part on strategic alliances with an expanding circle of public and private entities. Three of the key groups of allies are:

1. Our member State Arts Agencies (SAAs)
2. The National Endowment for the Arts (NEA)
3. Leadership organizations of many disciplines in the region.

1. Our member state arts agencies are first among equals in our strategic alliances. They invest in South Arts so that the arts resources of each individual state can be amplified by synergistic involvement with the rest of the South.

Member participation makes South Arts’ programs and services accessible to all nine states, working in tandem to strengthen and sustain the region’s arts ecology, while eliminating duplication of effort or service. We will act on opportunities to carry out collectively things the states cannot do alone, relying on our member SAAs for information and providing regional networking and professional development opportunities for SAA staff.

2. The National Endowment for the Arts charges South Arts and its colleague RAOs with carrying out regional activities and regional/national initiatives.

With NEA funding, we serve as a partner in implementing regional and national initiatives, connecting them to our mission, and communicating about regional and national issues and concerns. Through partnership activities, we demonstrate the value of the NEA to elected officials and other authorizers.

3. Public and private leadership organizations, although not tapped strongly enough for their participation and expertise in the past, are vital to the success of South Arts in the future.

While relationships with other regional organizations such as the Southern Governors’ Association and Southern Growth Policies Board are growing stronger, we have the opportunity and the need to engage a broader range of allies with a shared interest in the South’s progress and prosperity. Economic development and tourism entities, public and private educational policy groups, regional think tanks, universities and colleges, humanities organizations and associations of elected officials and policymakers need to be engaged.

In serving the same geographic area, South Arts and its member state arts agencies exist in a unique relationship. South Arts has similar responsibilities to support arts organizations and artists which provide arts experiences for people in the South, yet must consciously avoid duplicating effort. This Plan clarifies the means by which we will engage with the creators and providers of the arts at those points of regional scope, benefit or recognition.

The need for mutually beneficial strategic partnerships and alliances is evident in each of South Arts’ Strategic Plan goals and will lead to a stronger South Arts and a stronger region.

South Arts' Interrelated Goals



Smart Agenda
Convenor
Information Access
Link to the World
Sustainable Organization

Goal 1: The arts positively impact regional issues.

Goal 2: Dialogue and collective action with strategic allies brings about progress on key agenda issues.

Goal 3: Pertinent information and research is more accessible and usable to the region.

Goal 4: Increased opportunities and resources exist to extend the arts of the South within and beyond the regional borders, and to attract the arts of the world to the South.

Goal 5: Effective management and governance practices ensure our organization's stability.

The arts positively impact regional issues.

Rationale: The role of South Arts is first to articulate how the arts contribute to a variety of challenging issues that are critical to the health and vitality of the South, and then work to develop strategic alliances with networks and organizations leading to our involvement in regional policy discussions and decision-making. Integral to advancing this regional agenda is a robust arts ecology in the South. South Arts has the capacity to identify needs and design programs and services to help build and sustain arts opportunities in the region.

- **Identify relevant cultural, educational, political, social and economic issues**
 - Set an annual agenda for the arts in the South
 - Interact with regional organizations, networks, convenings and publications to maintain our awareness of the status of issues
 - Issue periodic *State of the Arts in the South* reports, highlighting projections, trends and offering policy and practice recommendations
 - Build a regional understanding of and effective uses for national trends and policies that affect our region

- **Develop new broad-scale initiatives that contribute to and are recognized as important to the health and vitality of the region**
 - Work with networks of education, arts education, and state and national arts leaders to develop a regional Arts Education Initiative
 - Develop a regional Creative Economy Initiative that builds on and enhances existing research about the South
 - Research and create initiatives as new opportunities arise or needs become priorities

Dialogue and collective action with strategic allies brings about progress on key agenda issues.

Rationale: The power of convening lies in the convergence of setting the agenda; drawing together those with valuable information, perspective and influence; and using gatherings – in-person and virtual – to inform and/or carry out South Arts’ other portfolio activities. Through the dialogue generated through convenings, we can identify arts and non-arts policy issues and provide opportunities for networking, dialogue, learning and action to address issues. South Arts is an experienced provider of professional development for those working in the public and private spheres of arts management and can work both regionally and nationally to build individual and collective knowledge and skills.

- **Organize conferences, summits, workshops and seminars to enlist and broaden the constituency on agenda issues**
 - Develop South Arts’ organizational capacity to successfully deliver quality convenings in a variety of formats
 - Effectively design convenings to engage leaders
 - Find opportunities to engage both arts and non-arts voices to develop alliances and creative solutions around shared issues
 - Position and deliver arts-based strategies and resources at others’ gatherings
- **Increase knowledge and effectiveness within the regional arts constituency**
 - Hold regional trainings for professional peer groups
 - Share/disseminate new research/trends with the field
 - Work with state arts agencies and other partners to identify and respond to emerging skills/knowledge gaps and needs in the field

Pertinent information and research is more accessible and useable to the region.

Rationale: Investment in research, development and evaluation is standard in most industries, while it is not in the arts sector. Our partner state arts agencies are particularly open to the use of regional research for public advocacy. The information available to the field is expanding exponentially, while resources including time and personnel are flat or declining. This can create a conflict for the field: when resources should be deployed most strategically, organizations can be challenged in engaging with information and evaluation in a way that allows them to make the best choices. The field will be strengthened by having greater ability to make information-based decisions, and learn through demonstration projects, models and innovation. South Arts can play a key role by filtering and contextualizing existing and new information with a regional and an arts perspective. We can contribute to the body of knowledge about what makes the South unique. Ready access to data and analysis related to arts education, economic trends and creative economies, arts participation, social engagement, and the use of social media is particularly crucial in advocating for the arts.

- **Make information accessible to inform decisions and actions**
 - Expand our organization’s research and analysis capacity internally and through partnerships and alliances
 - Collect and package strong data to support various types of advocacy in our region and to articulate the public value of the arts
 - Use research, data-mining and analysis to evaluate and inform our own work
 - Provide analysis and recommendations based on new information/research
- **Understand and work to improve the region’s standing in key agenda areas**
 - Track key data sets for the South over time to benchmark our status
 - Provide information for the arts sector to conduct effective state-level advocacy
 - Advocate for national and regional policy changes as indicated by existing and new information and research
 - Make information/research more useful through identifying other champions and messengers, and presenting/distributing it through networks outside of our own
- **Initiate research to develop new knowledge**
 - Engage strategic allies for the design, implementation and dissemination of new research
 - Position South Arts as a willing and able partner to regional and national researchers
- **Provide and encourage the use of best practices to arts constituents to strengthen their work**
 - Evaluate and promote pilot projects for implementation/evaluation of new practice including adaptation of work in other regions/fields
 - Disseminate ideas through traditional, existing and new channels, including technology

South Arts’ collection and dissemination of existing data, and potential work in generating new research, will be carried out as needs are identified. Sometimes data/research will be specific to our region and sometimes it will comprise regional information/comparisons pulled out of national data. Work in this area will serve those working in regional policy and leadership areas inside and outside the arts.

Increased opportunities and resources exist to extend the arts of the South within and beyond the regional borders, and to attract the arts of the world to the South.

Rationale: South Arts has the ability to increase the visibility of Southern arts outside our borders and use that as a tool to enhance the image of the South and the region. The South's artistic product has great potential as an export – economic and cultural – to the rest of the nation and the world. We are known for quality presentation of the traditional and folk arts of the region, and continue to expand our role in serving and promoting contemporary art forms and the arts of newly arriving cultural groups. As a regional arts organization we have a unique opportunity to make visible the authentic, comprehensive nature of Southern arts. Simultaneously, those in our region should have the chance to experience the best of American and world culture in their own communities, in ways that build deeper understanding of others and of the artforms.

- **Highlight and promote the full range and diversity of artistic expression, both traditional and new/contemporary, in the region**
 - Recognize, celebrate and promote excellent artists from the region
 - Design and implement actions, programs and communications that honor what is unique and treasured about Southern arts and culture
- **Increase opportunities and resources from public and private sources**
 - Connect Southern artists and arts organizations to national and international funders, presenters and other resources
 - Deliver programs that increase work and visibility for artists of the region, directly or through strategic alliances
 - Build relationships with businesses and other entities with regional and/or international interests that intersect with those of South Arts and our constituencies
- **Deliver timely and relevant arts programs and services that meet the needs of the region**
 - Develop an ongoing process to identify needs, which allows South Arts to design and implement regional programs and services
 - Identify promising local, state and out-of-region programs to adapt and bring to regional scale
 - Identify/develop the resources necessary to successfully implement and sustain programs and services
 - Develop arts programming to provide broad arts access to communities in the South
- **Increase national and international markets for the arts of the region**
 - Provide training to arts organizations and artists in the region for participation in international market opportunities
 - Participate in the Regional Arts Organizations' Global Positioning Strategies Initiative to increase two-way international artists' exchange
- **Make arts from across the country and around the world accessible to the people of the South**
 - Provide management and/or funding subsidies for the touring of regional, national and international arts in the region
 - Support artist residencies in communities
 - Equip our partner presenters to improve audience engagement

Effective management and governance practices ensure our organization's stability.

Rationale: South Arts has strong federal and state partners, but these partnerships have created a high level of dependence on public funding. We have a responsibility to expand our partnership base, both to attract investment by a broader range of public and private entities and to expand our communications and service networks. To best leverage our internal resources, we must continually ensure that we have the most effective staff and board composition and structure possible. We also must invest more heavily and strategically in marketing our programs and services and communicating the goals and value of South Arts to a broader public.

- **Sustain an effective staff and board to be successful in carrying out this strategic plan**
 - Implement a staff structure/responsibilities that align with the plan's goals and annual portfolio of activities
 - Identify professional development needs of staff and board and provide resources/training
 - Implement board and committee composition and structures to effectively govern the organization
- **Develop a financial master plan**
 - Identify and implement short and long term revenue strategies
 - Put benchmarks for revenue development into place to inform and support annual portfolio activities and new initiatives
 - Build South Arts' capacity to flexibly respond to new opportunities and shifts by funders and partners
- **Strengthen communications through a multi-year master plan**
 - Update organizational name and image
 - Develop strategies and allocate resources to achieve stronger organizational identity and communications
 - Maximize technology capacity for both internal and external communications and information management
 - Develop and allocate resources for a strategic communications plan for each portfolio area
- **Ensure that South Arts provides value and benefit for its member state arts agencies (SAAs)**
 - Work with SAA Executive Directors to translate this plan into specific actions that directly serve the goals of SAAs
 - Develop a regular communications process to assure ongoing intersection between this plan and SAA goals
- **Ensure accountability and guide decision-making through evaluation and reflection**
 - Enhance existing program evaluation process to clarify key criteria for decision-making
 - Use the strategic triangle to evaluate existing programs, assess the potential of new opportunities, and sunset programs when appropriate, resulting in an annual portfolio of activities which achieves South Arts' mission
 - Practice and model reflection and learning as a vital organizational tool

Planning Process

South Arts appointed a Strategic Planning Committee from its board, and a group of board member Responders, which began work in August 2008. During a two-day retreat the Committee identified main directions for the organization's future. These strategic directions were affirmed by the Responders, and then by the full board in November 2008. Research presented at this meeting also included a scan of major trends and dynamics affecting the environment in which South Arts works; needs in the region identified by our nine member state arts agencies which could be addressed at a regional level; and the results of individual interviews with each current board member conducted by independent consulting firm Marmillion+Company.

Following this meeting, Marmillion+Company interviewed 20 thought leaders from across the country and conducted a focus group with current agency staff. The Strategic Planning Committee met again for two days in March 2009, reviewing the final report from Marmillion+Company and further developing guiding principles, reviewing the results of an online constituent survey, examining the organization's relationships and environment, and refining the mission statement, vision statement and strategic directions. These were affirmed by the Responders with full board assent in April 2009.

Agency staff delved into each strategic direction, elaborating upon what the particular role of a regional arts agency can and should be in moving it forward. The strategic plan document was drafted and put through a series of reviews and refinements, involving the Strategic Planning Committee, Executive Committee, Responders, and guest readers. The Plan was recommended to the board by the Strategic Planning Committee in November 2009 and unanimously approved.

Strategic Planning Committee

Margaret S. Mertz, Ph.D., Chair
 Derek Gordon
 Todd P. Lowe
 Richard Ranta, Ph.D.
 Mary Regan
 Sandy Shaughnessy
 Susie Surkamer

Responders

Jim Clinton
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 William M. Nix
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Special thanks to:

Guest Readers

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Thought Leader Interviews

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 Joseph R. Bankoff, Woodruff Arts Center
 Ben Cameron, Doris Duke Charitable Foundation
 Liz Cole, International Conference of Fine Arts Deans
 Colleen Cosineau, Southern Legislative Conference
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Ruby Lerner, Creative Capital
Bob Lynch, Americans for the Arts
Sam Miller, Leveraging Investments in Creativity
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Maria Rosario-Jackson, The Urban Institute
Andrew Taylor, Bolz Center for Arts Administration, University of Wisconsin-Madison
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Sixto Wagon, DiverseWorks
Jack Walsh, National Alliance of Media Arts and Culture

South Arts Board of Directors

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Margaret S. Mertz, Ph.D., Executive Vice Chair; Thomas S. Kenan Institute for the Arts
Margaret "Tog" Newman, Immediate Past President
William M. Nix, Vice Chair External Relations; Palm Beach County Cultural Council
Richard Ranta, Ph.D., Treasurer; University of Memphis
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Scott Shanklin-Peterson, Secretary; College of Charleston
Ted Abernathy; Southern Growth Policies Board
Pam Breaux; Louisiana Division of Culture, Recreation and Tourism
Rich Boyd; Tennessee Arts Commission
Jim Clinton; Cenla Advantage Partnership
Stephanie Conner; Tennesseans for the Arts
Derek Gordon; Arts Council of Greater Baton Rouge
Al Head; Alabama State Council on the Arts
Dana La Fonta; Louisiana Division of the Arts
Ken May; South Carolina Arts Commission
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Dianne Walton
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