

CASE: The Venue Theatre, Conifer, CO

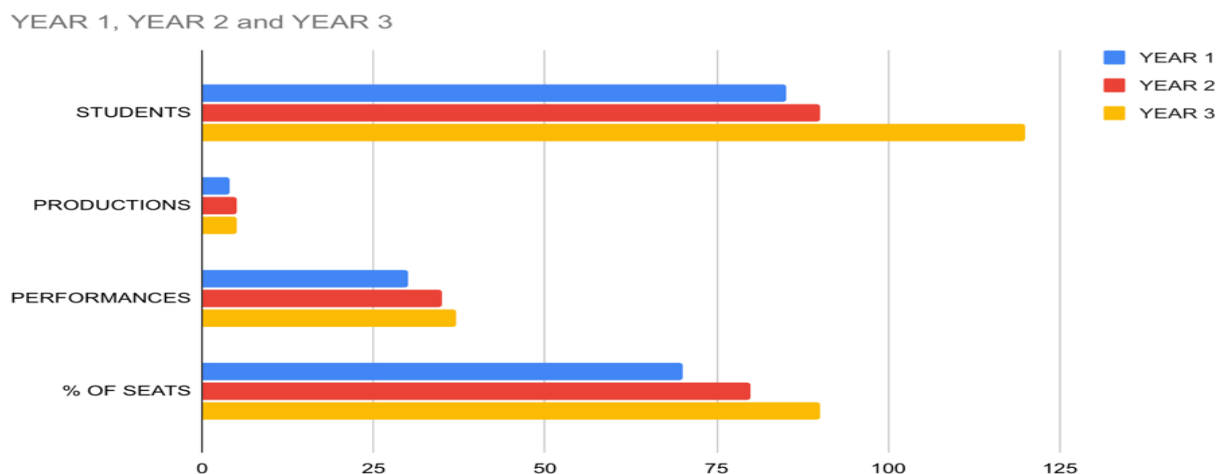
taken from “The Organization Development Practitioner and the OD Process” by Donald L. Anderson and Paul J. Liffengren (Anderson, *Cases*, p.77)

STATEMENT OF THE PROBLEM AND DIAGNOSIS

The Venue Theatre is a non-profit children’s education theatre that has been in operation for 3 years. They provide opportunities for students in elementary, middle and high school levels, with a mission of establishing an “accepting and enriching environment” and encouraging “discovery, exploration and celebration of their unique and extraordinary abilities.” It was established by its four founding members, who continue to be the primary directors of the productions; one founder has provided significant financial investment, including supplementing the salary of the executive director.

The current organization structure includes 1 full-time executive director, 2 part-time staff members, a board of up to 17 people including the 4 founders, student participants, and parent volunteers. They lease their rehearsal and performance space from a local shopping center, and most of the labor is provided by parent volunteers; their audience base is students, family members, and community members. Funding is partially provided by tuition from the students, ticket sales, and also from contributions from stakeholders.

Over the three years of existence, the Venue has shown steady growth in students, productions, number of performances, and percentage of audience seats filled (see chart below). In year three, there was a significant jump in students enrolled, going from 90 to 120 – but the number of productions was the same as year two, and the number of performances only increased by 2.



Based on an extensive interview with Susan, the executive director, a number of strengths, challenges, and goals have been identified.

Assets/Strengths:

- Commitment of students and volunteers
- Board that is invested in supporting and expanding staff
- Founders that are still involved
- Atmosphere, community, “magic place”
- Moving from survival mode to thriving
- Consistent steady growth so far

Goals:

- Expanding student numbers
- Reducing student tuition
- Possible expansion into new facility
- Repaying main founder’s investment
- More community involvement
- Marketing and building awareness of theatre

Challenges:

- Sustainable organizational health (each year, some board disagreement, and at least one board departure)
- Balancing goals of expansion with added costs/resources of additional productions
- Staffing – additional grants could bring on additional staff – how to shift duties around to avoid burnout?
- Expanding from current roster of directors (founders) from internal trainees
- Shifting board from worrying about day-to-day operations to long-term strategic thinking
- Leadership succession
- Maintaining charm and magic of intimate community-based work while also becoming more professional and sustainable as an organization.

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The Venue is at a critical point in its life – how can an organization that was initially built on volunteer energy and social relationships shift into a more professional and sustainable model of operation while still maintaining the community spirit that make it an enjoyable place to work? I’ve identified two major areas to work on with OD interventions: working with the full community to prioritize the listed goals; and working with the board to shift from a day-to-day operations outlook to long-term strategic planning. These two objectives are the most important first steps, and some of the additional challenges and goals will be able to be addressed once these are accomplished.

LITERATURE REVIEW

The Venue is in a unique position in the OD literature as a non-profit arts organization – documentation of OD processes in this field is limited. Where private businesses or government organizations might have clear metrics of profit or tax revenue to be guided by, “success for an NPO means working to make the organization’s vision and mission become a reality.” (Gratton, p. 28)

As I’ve identified above, one of the primary needs for Venue Theatre is to engage in strategic planning and long-term visioning. The board of the Venue is struggling with a common issue, as identified by Gratton in a 2018 article: “the role perceptions of NPO boards of directors, where short-term matters of accountability and operations tend to overshadow activities related to strategy, training, and development” (Gratton, p.30). Before engaging in strategic planning, it’s important to identify whether the organization is prepared for investing the kind of time and resources required. Gratton states that an organization that is ready for and seeking change “should have processes in place to collect the information required for the strategic planning process. This includes basic financial information such as balance, cash flow, and profit and loss sheets as well as other metrics related to organizational performance. A unified leadership team should be in place, including a board of directors and executive staff.” (Gratton, p.32-33). It appears that Venue does meet these criteria. But as Gratton lays out, there is a possibility of pursuing a less intensive Appreciative Inquiry process if the full Strategic Planning process is determined by the client to be too big of a step currently.

This process is clearly a team intervention, and as such some of the specific intervention methods laid out by Anderson in *Organization development: The process of leading organizational change* (2020) appear appropriate. The first step would be using a team diagnostic meeting as a data-gathering method. As Anderson describes it, “team members discuss the team’s strengths and weaknesses, and they design their own action plans to address them” (p.265). While this may generate additional plans for team-building, I would recommend one of those actions be a Role Negotiation and Role Analysis – one of the common scenarios in which this is helpful is “the team may have evolved a new vision, purpose, or strategy, but old roles still remain” (Anderson, p. 270), and this certainly applies to the Venue board. This new role will require the board to “commit to measurable goals, approve priorities for implementation, and also make a plan to revisit the strategy on an ongoing basis as the internal and external environments change.” (From <https://www.councilofnonprofits.org/running-nonprofit/strategic-planning-nonprofits>) Shifting from short-term operational decision-making into long-term visioning will be a challenge for the board, but as Gratton puts it, “The real benefit of strategic planning is engaging an organization’s members through inquiry and self-reflection. This should lead to clear-headed thinking about where the organization is positioned, where it is going in the future, and how it will get there. When used with wisdom, strategic planning can be an excellent catalyst for real and lasting organizational change” (Gratton, p.31)

In addition to the board working on strategic planning, the organization as a whole should be invited in to envision the Venue’s future and next steps. This is an organization that serves a wide community with multiple stakeholders (staff, board, students, volunteers, audience, etc.), and it’s important to tailor the OD work with them to fit a multi-group model. Such a model has been laid out by Gordezky in the chapter “From them to us: working with multiple constituents in dialogic OD” from *Dialogic organization development* (Bushe, Bushe, and Marshak eds., 2015). He describes his experience as “I experienced organizations as verbs, active communities of people working together to achieve results but were hampered by an assortment of barriers” (p.305-306). I believe this description fits Venue Theatre quite well. It’s also clear from the description of the case that many people involved from the founders to the

board to the staff have treasured stories about how this company was founded and has grown. As Swartz lays out in their chapter in the same book (“Coaching from a dialogic OD paradigm”), “Prevailing narratives, which explain how things are, are shared by a group of people, help them make sense of their world, and provide a rationale for decisions and actions” (p.350). A process will need to be developed to bring all these groups together to establish both the narratives they have for how the organization has grown, as well as a narrative for how it should move forward into the future.

Sibbet & Wendling, in their book *Visual consulting: designing and leading change* (2018), lay out a model of process consulting that I think will work well for the Venue Theatre. As they describe it, “the client contracts with you, the consultant, to facilitate the organization to perceive, understand, and develop the organization’s business and human processes, in order for the client to improve the situation themselves” (p.72). Through their Liminal Pathways Change Framework, stakeholders work together to move through from Uncertainty to Excitement as they identify new pathways forward. They focus on creating visuals with the group, such as “process maps, charters, stakeholder maps, and other shared visuals to help strengthen conceptual containers to support continuity” (p.156). Once a new future has been envisioned, “commemorate it with new narratives and generative images drawn from the process. Creating large, original murals of co-created visions can help the new stories take root, and will help a much wider range of people share the same story” (p.165). Such a visual method should work well with an arts organization, as well as appeal to a group of stakeholders who would range in age from children to older adults. I envision combining these methods with Gordezky’s steps of multi-group convening (p.320-22):

1. “strengths as perceived from the different perspectives”
2. “exploration of the present” – “what opportunities might exist... that could form the foundation for renewal”; “what groups hold in common, and where their differences appear to lie” – “establishes a ground truth”
3. generative inquiry – “correlate possible desired futures” – small groups that mix perspectives, each group presents back to the whole
4. strategic inquiry – “next steps and planning for the future”

INTERVENTION

2 primary interventions will be used, one for the organization as a whole, and one for the board of directors specifically.

- Organizational intervention:
 - Invite staff, board, founders, students, volunteers, and invite audience members and other community members who provide services
 - 1st meeting (prior to team intervention with board of directors):
 - Split attendees into small groups of 6-7 people based on affiliation (for example, 2 small groups for the board members, 1 group for staff, etc.)
 - Using the visual consulting methods laid out by Sibbet and Wendling, walk the groups through drawing process maps and visual representations of the origins of the organization and growth up to now.
 - Use first two steps of Gordezky’s multi-group convening framework:
 - 1 – “strengths as perceived from the different perspectives”
 - 2 - “exploration of the present”
 - Bring the larger group back together to share, building a common narrative of the priorities and strengths of the organization in the present moment
 - 2nd meeting (after team intervention with board of directors):

- Review the work from 1st meeting
- Encourage board to share their new roles and ideas
- Split attendees into small groups of 6-7 people with mixed affiliations
- Using the visual consulting methods laid out by Sibbet and Wendling, walk the groups through drawing process maps and visual representations to envision new priorities and next steps.
- Use the final two steps of Gordezky's multi-group convening framework:
 - 3 - generative inquiry into "possible desired futures"
 - 4 – strategic inquiry
- Team intervention with board and executive director to work on long-term planning
 - Team diagnostic meeting – with facilitation from the consultant, "team members discuss the team's strengths and weaknesses, and they design their own action plans to address them" (Anderson, p. 265)
 - Role negotiation and analysis meeting – review the needs of strategic planning, facilitate discussion with the board on how roles within it need to shift to address those needs
 - Any additional steps identified during the diagnostic meeting

IMPLEMENTATION – 6-MONTH PLAN

- MONTH 1:
 - Qualitative surveys sent out to all stakeholders; what are strengths, what are challenges, which priorities do you see as most important going forward?
- MONTH 2:
 - Initial organizational meeting to do steps 1&2 of multi-group convening
- MONTH 3 & 4:
 - Board team intervention
 - Multi-step process – may require up to 4 meetings
- MONTH 5:
 - Final organization multi-group meeting to do steps 3&4
- MONTH 6:
 - Meet with board and staff to assess process and discuss evaluation methods

EVALUATION

- Qualitative – follow-up survey 1 month after meetings are completed – how do responses compare?
- Qualitative – Follow-up meetings with board, how are new roles and responsibilities working out? 1 meeting at 6 months, 1 meeting at 12 months
- Quantitative – how do measures of participation, shows, audience size compare to previous year? 12-18 months later

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