

**Strategy Guidebook**  
*June 2022*

ABOUT THE GUIDEBOOK

**This strategy guidebook centralizes the ideas, information, and aspirations guiding our decisions.**

We intentionally avoid the development of highly-linear, future-predicting, traditional strategic plans. Instead, we aim to constantly seek clarity about the external environment, maintain access to diverse perspectives, and engage in iterative development of our work through regular experimentation. Across these activities, we use a clear set of values, overarching aspirations, and organizational muscles to grow the quality and capacity of our service.

Guidebook Sections:

1. **Context** - The history and current situation of CultureSource presented in brief
2. **Foundational Statements** - This expresses the core beliefs of our organization
3. **Our Whys?** - Section elements comprise the justification for our choices about what work to do
4. **Strategy Arc** - The overarching five-year trajectory of our organizational development
5. **Our Work** - The current and future themes and dimensions of our programs and services
6. **Rubric** - The framework for how we understand and assess our success
7. **Models** - Diagrams illustrating the systems thinking we apply to our work

CONTEXT

CultureSource is a Detroit-based membership association that supports the vitality and sustainability of the Southeast Michigan creative community. Around 170 arts and culture nonprofits comprise our membership and we also use our expertise to serve artists, policymakers, and philanthropists striving to have creative and cultural expression benefit the public across the seven-county region.

Our work involves facilitating convenings and networking activities, managing funding/grantmaking initiatives, collecting data, and sharing knowledge.

In recent years, we have intensified focus on growing relevance and capacity, in part, through establishing an organizational culture of experimentation and adaptation. Our **progress since 2017** makes us proud:

- Our **annual budget** has nearly **quadrupled**, from \$584,000 to \$2,300,000.
- Our **membership** has nearly **doubled**, from 92 to 170 organizations.
- Our resource intermediary work managing **funding programs** grew from \$45,000 to \$1,000,000.
- We launched a **new research agenda** with three long-term partners: 8 Bridges Workshop, WolfBrown, and the Arts, Entrepreneurship, and Innovation Lab at Indiana University.
- We launched **new major programmatic efforts** related to tech and arts (with Gilbert Family Foundation), racial equity (with the Ford and Kresge foundations), adaptive leadership (with EmcArts), and art in public spaces (with Mural Arts Philadelphia).
- We got a **new visual identity and infrastructure**: CRM system, website/web host, cloud computing platform, and office space.



This growth has happened with guidance from our 17-person board of directors, full of executives experienced in business development, and it is attributable to our 8-person team's evolving efforts to address member and partner needs and to our investments in strategy refinement. It is also attributable to the way Covid-19 galvanized our motivation and increased our work output in support of sector relief, resiliency, and innovation in crisis.

## FOUNDATIONAL STATEMENTS

Our **mission** is to advance the work of organizations that cultivate creative and cultural expression in Southeast Michigan.

Our **vision** is of flourishing Southeast Michigan communities that visibly benefit from a diverse and thriving arts and culture sector, which itself receives indispensable support from CultureSource.

### **What "culture" means:**

Culture embodies the ability of people to share ideas and identities. It exists to be experienced, and in those experiences, it moves individuals to feel more connected among friends, family, colleagues, and neighbors.

As energy that catalyzes connectivity, culture needs space in which to grow, and the ideal caretakers of that space are artists and leaders (artists as people who create and leaders as people who make space for creations).

These artists and leaders skillfully repeat, regenerate, and remix traditions and beliefs, and through these acts of care, they clear barriers of fear, create channels of influence, and seed diversity. Their work of reinforcing culture is also shared with institutions and landmarks, which exists as accessible, anchoring hubs of connectivity.

Far away from these anchors, though—at the edges—culture is born and remade. Here, boundaries are fluid and practices of inclusion ignite discovery, imagination, and innovation.

Ultimately, whether near an anchor or edge, culture celebrates the collective and unexpected interactions of individuals that emergently shape the future.

## OUR WHYS?

### **Our guiding principles:**

- We are at our best when we work with partners and as connectors and instigators.
- A solid financial core is essential to our capacity to serve.
- We must embrace contemporary culture at its core and edges.
- Cultural organizations of all sizes can be valued as community anchors.
- We speak clearly, respectfully, and inclusively.
- We have a responsibility to elevate voices historically oppressed by privilege.
- We believe creativity is fundamental.





Based on lists we have analyzed, we believe 360 arts nonprofits in the seven-county region are eligible to be CultureSource members.

When articulating the most well established, the most well-known nonprofits in the region, nearly all are dues-paying members of CultureSource. Similarly, when looking at public grant funding lists, recipients of institutional philanthropy are overwhelmingly our members too.

Those members include arts and science centers, museums, orchestras, historical societies, afterschool arts programs, theaters and theater companies, and dance and design collectives, and they have local, statewide, and national reputations for helping and anchoring their communities.

While member organizations pay suggested dues based on their budget size, our pay-what-you-can model generates a commitment bond between each member and CultureSource and makes the ability to join nearly barrier-free.

The few exception organizations that are not members have consistently expressed to us directly that they are not interested in joining because they don't want to pay, it's not a priority, or they don't have the time to engage.

NEXT: **To be truly relevant today and in the future**, CultureSource must have services that comprehensively address people and professionals' interest in increasing community vitality and generating public benefit through creative expression. Those interested in this work continue to include arts nonprofits (our traditional members), but also include artists, arts philanthropists, policymakers, lawmakers, and commercial arts venues and businesses (*and these groups, not traditionally our members, will soon to gain eligibility as we evolve our service capacity, and again, our relevance*).

## OUR WORK (TODAY)

Anyone in regular contact with the work of CultureSource knows that change has been constant. Themes and helpful buckets have emerged across our work that provide helpful containers for communicating focus to external partners and better understanding opportunity and next steps.

Our three **service pillars** characterize the work we do:

- Convening - We connect leaders, organizations, and ideas
- Funding - We help fund creative projects and people
- Research - We share knowledge to advance the sector

Within our service pillars, we explore one or more of our **focus areas**:

- Business building
- Adaptive leadership
- Tech and arts
- Creative space
- Arts education
- Representational justice

Five **core dimensions** of our organization enable or facilitate our work, and require ongoing attention (*are explained in greater detail in the rubric section of this document*):

- Membership
- Partners
- Cultural competency
- Programs and services
- Internal capacity



**Movements:** As associations move away from a traditional hub-and-spoke model given democratized access to information and networks, from time to time and more often, our work is about building movements and coalitions for collective action on special topic issues that are big, bold, and evolutionary.

### OUR WORK (TOMORROW)

While we do not have a scripted or pre-scheduled set of program and service activities, we must constantly use the following to spur thinking and guide choices:

**Experiments:** in three phases design/research, prototyping/assessment, scaling/integration

**Talent:** emerging opportunities based on the skills and interests of current board and staff

**Crisis:** always ready for purely responsive work when a crisis emerges

**R&D:** joining coalitions of likeminded peers to search for problems and solutions

**Strength Training:** building muscles of adaptive leadership to purposefully work in an unpredictable future (below are the six capacities of adaptive leadership).

- Get on the balcony - see patterns
- Identify complex challenges
- Regulate distress - generative conflict
- Maintain disciplined attention
- Give the work back to people
- Protect leadership voices from below or outside

### ORGANIZATIONAL RUBRIC

This rubric outlines our trajectory for achieving our highest ambitions as a service organization supporting art and creativity in the seven-county Southeast Michigan region anchored by Detroit. It is not a best-practice roadmap to success; rather it is a framework to adaptively understand and work on what is important to us. This document works in concert with our other foundational beliefs (below) to ground our board and staff in our values and offer our allies opportunities to amplify our efforts.

In the rubric, we identified five core dimensions of our enterprise: **membership**, **cultural competency**, **programs and services**, **partnerships**, and **capacity**. Along these dimensions, we will categorize our day-to-day work, plan long activity arcs, evaluate progress, and report on our organizational development. Below is supplemental background and context for three of the dimensions:

**Membership** - We finished 2022 with 170 dues-paying member organizations. They include arts and science centers, museums, orchestras, historical societies, afterschool arts education programs, and dance and design collectives, and they have local, statewide, and national reputations for anchoring their communities. We also use our expertise to serve artists, policymakers, and philanthropists striving to have creative and cultural expression benefit the public across the seven-county region.

**Programs and Services** - We facilitate convenings and networking activities, manage funding/grantmaking initiatives, collect data, and share knowledge. These activities help us expand the creative community's business capacities and understanding of contemporary ideas, cultures, and art forms.

**Capacity** - Our organization is governed by a 17-person board of directors composed of cultural sector professionals and laypeople. Daily mission administration is performed by an 8-person staff. This internal team relies on regular contractors for finance, IT, and human resources services.



Dimension	Unacceptable	Adequate	Good	Transformational
<b>MEMBERSHIP</b>  CultureSource (CS) understands the needs and opportunities of the ecosystem of arts and cultural organizations in SEMI.	Members begrudgingly renew, if at all.  Membership is exclusively well-resourced nonprofits.  Staff and members infrequently connect.	CS engagement with members is reactive and inconsistent, however, members view CS as useful.  Participation of member staff is minimal within each member organization.  Members are geographically located only in Wayne, Oakland, and Washtenaw counties.	Members and nonmembers alike proactively engage CS with questions, ideas, and with mobilization and convening opportunities.  Members reflect the geographic, artistic, and cultural diversity of SEMI.  Multiple staff throughout member organizations consistently engage with our work.  CS is externally recognized for excellence in serving members, based on standards of joy, inspiration, innovation.	Member organizations engage as full organizations: staff and volunteers.  Member organizations' CEOs work through and within CS to create and implement sector-wide agendas.  CultureSource membership is not defined exclusively by being an arts organization, though members are commonly connected to daily life in SEMI.



Dimension	Unacceptable	Adequate	Good	Transformational
<p><b>CULTURAL COMPETENCY*</b></p> <p>CultureSource holds that diversity, equity, and inclusion (DEI) are imperatives in its own work and in our communities.</p> <p>*Cultural competency defines our efforts to adapt to the different identities of our neighbors and create opportunities for them to flourish.</p>	<p>Efforts to advance DEI are sporadic and driven only by CS staff.</p> <p>CS board members cannot articulate the organization's intentional work in DEI.</p> <p>Partners do not perceive any visible activities or progress related to DEI.</p>	<p>CS has public-facing DEI values and policies that are evident through its program, personnel, partner, and vendor choices.</p> <p>The CS board is an internal leader in setting and tracking CS DEI imperatives.</p> <p>CS occasionally mobilizes around DEI efforts.</p>	<p>CS's focus on DEI exists, in part, as a brand that internal and external stakeholders respect and can articulate.</p> <p>CS accelerates and roots diverse leadership and inclusive leadership practices in the regional cultural sector.</p> <p>CS staff articulates and advocates for equity-focused standards in its program/service development.</p> <p>CS consistently mobilizes and energizes members and peers around DEI efforts.</p>	<p>CS is recognized nationally for persistently evolving, challenging, and extending its work around cultures of belonging.</p> <p>Each board and staff member has an individualized cultural competency learning plan supported by CS.</p> <p>CS is called on to advance and mobilize groups related to DEI outside of the arts, through the arts.</p>



Dimension	Unacceptable	Adequate	Good	Transformational
<b>PROGRAMS &amp; SERVICES</b>  CultureSource's PS (Programs/Services) are high impact and contribute to a flourishing arts and culture sector in SEMI.	<p>CultureSource has no impact on the health of the cultural sector. Its members question the value of attending future activities.</p> <p>CultureSource rarely collaborates with partners on program development or implementation.</p>	<p>PS impacts are inconsistent and limited in reach to the closest, most obvious, and best-resourced audiences.</p> <p>PS reflect clear alignment with CS's vision, guiding principles, and strategic blueprint.</p> <p>Follow-up and reflection are built into most PS. Most PS are developed and implemented with a partner.</p>	<p>PS frequently exceed participants' expectations.</p> <p>PS generate reliable revenue aligned with cost/benefit value.</p> <p>Participation in CS PS is considered to be essential for arts and culture workers in SEMI.</p> <p>PS experiment with new delivery and content models and strategies, and track alongside national conversations about the arts and culture.</p> <p>Multi-year systems are in place for collecting evidence of impacts and for continuously learning and improving.</p>	<p>PS anticipate sector needs and regularly surprise participants with PS content.</p> <p>PS receive national attention that leads to CS being a national site for incubation and the development of new initiatives.</p> <p>CS can trace the influences of our programs across the evolving conversation about the arts in communities.</p> <p>Rigorously researched dimensions of PS allow for the sustainable integration of our work into academic cultures across SEMI.</p>





Dimension	Unacceptable	Adequate	Good	Transformational
<b>PARTNERSHIPS</b>  CultureSource offers multiple avenues for cross-sector partnerships that benefit the arts and culture ecosystem of SEMI.	<p>Non-arts sector leaders report no awareness of CS's work and impacts, and arts sector leaders have a superficial understanding of CS's work. These leaders rarely call on CS.</p> <p>CS has no strategic systems for cultivating partnerships: we wait for others to come to us and often work alone.</p> <p>CS inaccurately promotes and recognizes partnerships.</p>	<p>CS maintains partnerships primarily with individuals and entities already deeply engaged with the SEMI cultural sector.</p> <p>CS has policies, practices, and a reputation that reflect effective, legally sound, and joyful partnerships.</p> <p>CS board and staff have well-defined roles in partner cultivation.</p> <p>CS has up-to-date digital and print information about our programs, services, purpose, and impacts, and our visual identity is deployed with rare inconsistencies.</p>	<p>Non-arts sectors connect with CS to learn about and benefit from the cultural ecosystem.</p> <p>Representing CS, board and staff are frequently invited to early-stage meetings of influencers.</p> <p>Most CS partnerships have multi-year commitments or clear opportunities for renewal.</p> <p>All staff and board proactively engage in partner cultivation and stewardship.</p> <p>The CS brand is memorable and strategically deployed to generate new partner engagement.</p>	<p>Leaders outside of arts and culture (local to national) turn to CS as an obvious ally and collaborator, and bring ideas and financial resources to the table to make good things happen.</p> <p>Partners are committed to the long-term success of CS and offer both venture and sustaining investments toward CS's work.</p> <p>CS has the capacity to handle multiple, simultaneous partnership requests that bring new ideas and resources to SEMI.</p> <p>People want to be at the table when CS announces partnership opportunities.</p>



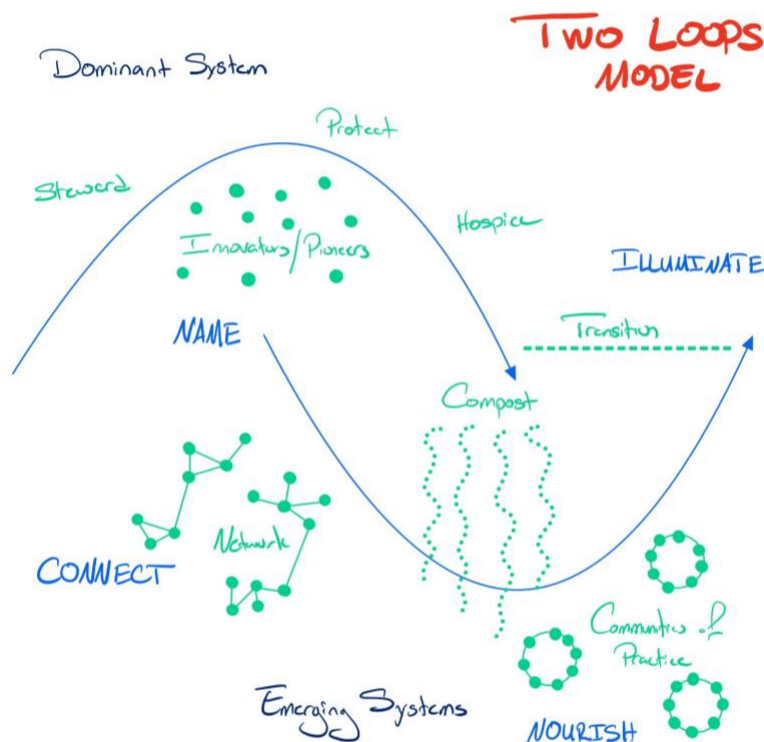
Dimension	Unacceptable	Adequate	Good	Transformational
<p><b>CAPACITY</b></p> <p>CultureSource has the staff capacity, governing board, financial resilience, and brand profile to fulfill its highest aspirations.</p>	<p>Board members are apathetic with limited and unreliable attendance, financial contributions, and public support.</p> <p>CS has significant audit findings. Management frequently overspends without budget authority, and there is a weak plan—at best—for achieving the annual budget.</p> <p>Staff cannot meet goals, they are constantly overworked or are allowed to underwork, they receive no training or job-performance resources, and their turnover is rapid.</p> <p>Infrastructure and internal systems reflect outdated practices, equipment, and policies.</p>	<p>Every board and committee meeting achieves quorum requirements.</p> <p>Board members can articulate how their services are aligned with approved responsibilities and expectations.</p> <p>CS balances its annual budget but is not growing its surplus. Financial systems are inefficient.</p> <p>Staff achieve some goals but miss others. Morale is weak.</p> <p>Infrastructure and internal systems reflect standard, acceptable practices.</p>	<p>Board members participate and contribute generously, regularly meeting goals related to both.</p> <p>CS has achievable plans to grow reserves, has developed multi-year financial outlooks, and benefits from robust tracking, analysis, and reporting.</p> <p>CS staff has time and resources to do satisfying work and can easily connect the impact of their work to the growth and development of CS.</p> <p>Infrastructure and internal systems reflect effective practices.</p>	<p>Board members fully integrate CS into their aspirations for their households or businesses. They are angel investors for CS, they consistently exceed fundraising goals, and they each have a favorite CS project to which they offer dedicated, consultant-quality support.</p> <p>CS has diverse and reliable income streams and sufficient financial reserves to sustain the organization in a crisis, take risks, and fund the launch of its own new initiatives.</p> <p>The CS team is a font of new, visionary ideas, and constantly evaluates and re-works their roles.</p> <p>Teamwork is joyful, inspiring, and challenging.</p> <p>Infrastructure and internal systems reflect innovative practices.</p>



## MODELS

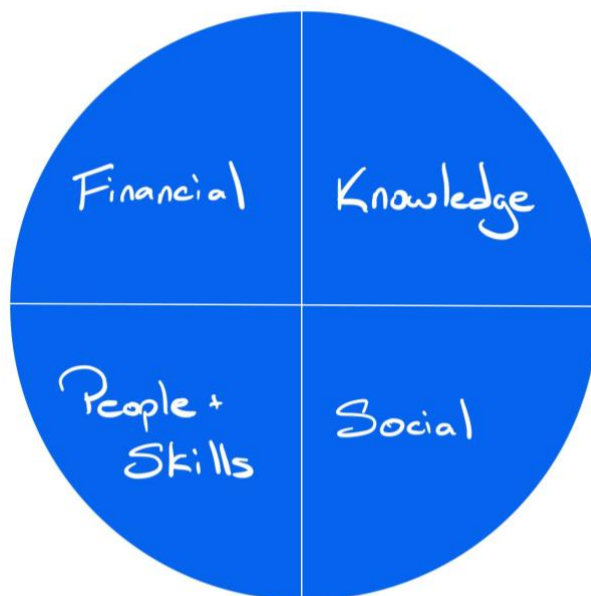
The strategy undergirding our work choices is influenced by general and arts-specific ideas about systems and organizations. They have been helpful visual tools articulating and giving shape what is happening inside of our organization.

- **Two Loops** - via the Berkana Institute
- **Complete Capital Framework** - via the Nonprofit Finance Fund
- **Cynefin Framework** - via David Snowden
- CultureSource's **Strategic Blueprint**
- **Trend and Influence Continuum** - via Issue Media Group



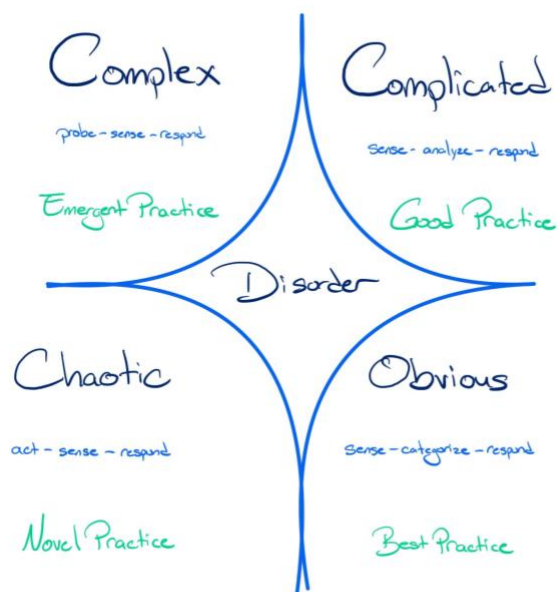


## COMPLETE CAPITAL



via Nonprofit Finance Fund

## CYNEFIN FRAMEWORK



by Dave Snowden

Members = Alliance → Vitality

Tactics + Focuses

Creativity Visibility Thrivability Goodness

DEI Partners

Board + Staff

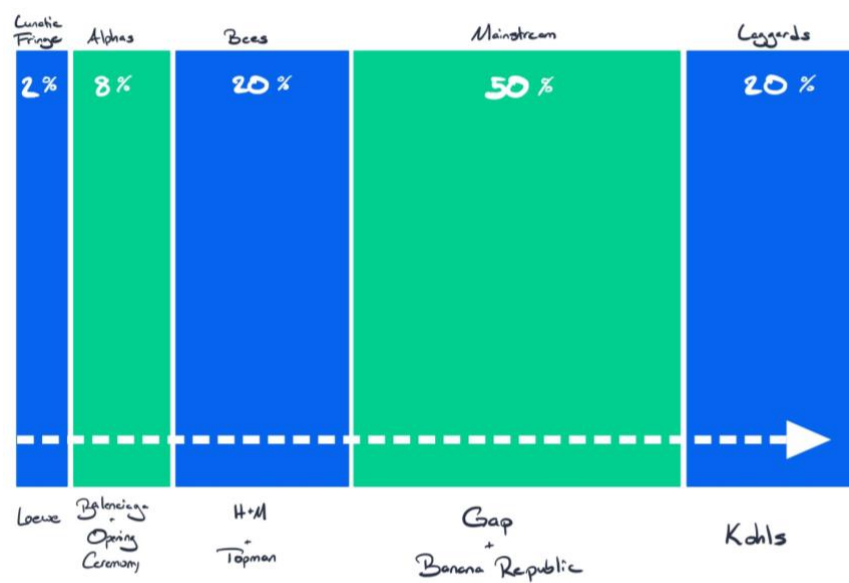
Capacity Sparks Foundation Reflection

CULTURE SOURCE

STRATEGIC BLUEPRINT



## TREND • INFLUENCE CONTINUUM



Via Issue Media Group