

REPORT ON STRATEGIC PLANNING FOR LOCAL LEARNING:

THE NATIONAL NETWORK FOR FOLK ARTS IN EDUCATION

December 2016

Lisa Mount

BACKGROUND

Local Learning is a national network comprising folk culture specialists, folk artists, and educators who have developed Folk Arts in Education (FAIE) programs and resources in a wide variety of educational venues. The organization is dedicated to the belief that "local learning"—the traditional knowledge and processes of learning that are grounded in community life—is of critical importance in education because local knowledge has the potential to transform learning, create stronger communities, and build intercultural understanding. Local Learning supports its associates and educates others through professional development for teachers and artists, participation in public policy as a national arts service organization, ongoing networking, quarterly electronic bulletins, and annual publication of the peer-reviewed, multimedia *Journal of Folklore and Education* (JFE) found on the Local Learning website, <http://www.locallearningnetwork.org/>.

Local Learning began as the National Task Force for Folk Arts in Education during a 1993 roundtable at the National Endowment for the Arts. It is now organized as a 501(c)(3) nonprofit with two part-time staff (Director Paddy Bowman and Assistant Director Lisa Rathje) and a board of directors from a variety of folklife organizations nationwide (Anne Pryor, chair; Betty Belanus, Linda Deafenbaugh, Mike Knoll, Maida Owens, Steve Zeitlin).

Like many founder-led folklife nonprofits, Local Learning is at a pivotal moment in its organizational life because of both internal and external factors. A strategic planning committee consisting of board and staff members identified the questions and ideas that Local Learning wanted to address through a facilitated conversation: 1) To understand our unique positioning and skillsets related to our organizational mission and vision more fully, 2) To think deeply about who we serve and how we can best serve them, and 3) To ask what steps Local Learning should take to develop confident organizational sustainability and enhance its status as a national arts service organization.

Local Learning contracted with [Lisa Mount](#), a consultant to nonprofit cultural organizations with Artistic Logistics, to facilitate a two-day strategic planning retreat to answer these questions. Mount has a 20-year history of working with a wide array of arts and culture organizations on strategic planning, organizational development, leadership transition, and field-wide organizing. Mount notes that guiding organizations through processes that result in decisions that are both thoughtful and actionable is always a customized process designed in collaboration with her clients. Some principles that informed her facilitation included her insights that “best practices” are useful but not prescriptive; identifying the goals that have the greatest potential to increase the quantity of organizational energy and relevance yields plans that are genuinely strategic and have a high probability of being implemented; and that H.L. Mencken was right when he said, “for every complex problem there is an answer that is simple, clear, and wrong.” She shared this equation with Local Learning, borrowed from Villa and Knoster in their work on systems change (found in *Restructuring for Caring and Effective Education: Piecing the Puzzle Together*, ed. Richard Villa and Jacqueline Thousand; Baltimore: Paul H. Brookes, 2000):

$$\boxed{\text{Vision}} + \boxed{\text{Skills}} + \boxed{\text{Incentives}} + \boxed{\text{Resources}} + \boxed{\text{Action Plan}} = \text{Change}$$

The intense planning process that occurred over these two days focused upon how Local Learning might fill in the details in each of the equation's components, with the group staying mindful of the dynamic forces shaping the important work of the organization—including the external impacts like the changing field of education, the current landscape for folklife nonprofits, and special challenges facing national service organizations, as well as internally with Local Learning's leadership succession planning.

### STRATEGIC PLANNING

Local Learning held the two-day strategic planning session with six board directors and one staff member in Washington, DC, on December 13-14, 2016, in a meeting space donated by the Smithsonian Institution's Center for Folklife and Cultural Heritage. In advance, the board did several visioning exercises suggested by Mount and a small committee worked with her to determine mutually an agenda that aimed for these intended outcomes:

- Affirmed or revised mission for the organization (revision directions, not wordsmithing)
- Vision for sustainability in five years
- One-year actions to move toward the vision, with responsibilities and a timeline
- Quarterly benchmarks, with assigned responsibilities, for 2017

To reach those goals, the agenda included:

#### DAY 1

- Introductions Name one element of Local Learning that makes you proud to be associated with it.
- The WHY of Local Learning Why does this national network matter? Whom does it matter to now?

- Local Learning: Unique Positioning What does Local Learning do that no one else does? What can Local Learning do that no one else can? Who might take advantage of these skills and resources but does not currently? What is the relationship of Local Learning to the American Folklore Society and to other national arts and culture service organizations? How can Local Learning better serve the field of folklore—public and academic?
- Mission Check Does the current mission statement reflect the why and the unique positioning of Local Learning? If not, what are some key beliefs and concepts that need to be included in an updated mission statement?
- How to Monetize the Value of Local Learning What would it take to turn Local Learning's unique positioning and expertise into revenue—earned or contributed?
- Five-Year Vision Assuming that *sustainability* is the overall goal, what does that look like in five years?
- Obstacles to Achieving the Vision What is stopping Local Learning from reaching this vision of sustainability? Identify internal weaknesses. Identify external influences and forces. Name obstacles as concrete things, not “lack of...”
- Practical Actions What innovative, practical actions will address the obstacles and move Local Learning toward its vision of sustainability? Reality check: is this possible? Do you have access to the resources to implement these plans?

- Actions to Initiatives How do these actions group themselves into first-year initiatives? What is the highest priority for obstacle-destruction? Who is responsible for action areas?

## DAY 2

- Mission Implications Review yesterday's direction for mission, align with sustainability. Revise action plan as needed.
- Quarterly Benchmarks Small teams work on quarterly benchmarks for first-year initiatives. Identify responsibility details.
- Drivers and Restraints What inspires you to achieve these plans? What holds you back from achieving these plans? What inspirations can you return to keep moving forward?
- Next Steps Enact action agreements.
- Meeting Evaluation

## RESULTS

We crafted five-year goals for Local Learning, generated a set of obstacles to achieving that vision, and crafted one-year initiatives that will guide the work going forward. We created detailed documentation of these decisions and plans. The key elements of the goals are:

- Increase staff capacity and organizational sustainability
- Formalize the network
- Support *JFE* and increase its readership; it is the signature program of Local Learning

- Implement an awareness campaign
- Support programs that meet the mission, increase visibility, and generate revenue

Through this facilitation, important aspects of the significant knowledge and skills that Local Learning bring to FAIE and the field of folklore were articulated and surfaced in new ways. For example, when the group pushed beyond the observation that working with traditional and folk arts in educational settings makes the organization unique, it became apparent that the importance of doing work based in ethnographic practices of documentation, engaged listening, and valuing community-based knowledge in educational settings is powerful because this creates specific strategies to teach students discernment about their own community and others. When individuals can understand their community, they can understand their place in it AND ways they can influence it—a cornerstone of civic engagement. FAIE has a toolkit to foster respect, curiosity, and greater understanding of difference. Local Learning has the platform to amplify the stories that come from the use of this set of skills and to advocate for the inclusion of FAIE in diverse educational settings.

The initiatives to be accomplished within one year (in priority order) are:

- Support the leadership transition
- Create and implement a fund development plan
- Develop the board
- Build the network using technology and outreach
- Start an awareness campaign
- Keep JFE front and center
- Build a program for which to pursue targeted funding

We developed an action plan for 2017, broken down by quarter, with responsibilities assigned. The board met in executive session and later convened a formal board

meeting to adopt the plans. We concluded the meeting with a brief evaluation discussion, framed as a “plus/delta” exercise, in which we identified positive aspects to keep for future meetings and aspects that we would change for future meetings. Two key positives were: 1) a face-to-face meeting was essential to this work, which is not an easy accomplishment for a national board; and 2) the facilitator’s skill in process, planning, and visualization of abstract ideas was essential.

Local Learning is very appreciative of AFS support that allowed us to conduct this essential planning.