STRATEGIC PLANNING:

A GUIDE

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1 Embarking on Long-Range Planning

1.1 The primary aims of any long-range planning process are, first, to develop a consensus with respect to the strategic priorities facing an organization over the five to seven years ahead and, secondly, to underpin that consensus with an agreed and achievable plan that articulates the organizational and financial implications of addressing those priorities. The paperwork – a document recording the steps to be taken with appropriate milestones and budgets – is important. But it is secondary to the basic objective of securing an informed consensus about strategic priorities and how to achieve them.

1.2 Our recommendation is that the planning process should consist of not less than three scheduled, high-level sessions comprising board and management. The first of these should focus on mission and program; the second on the organizational and financial implications of provisional decisions reached on mission and program; and the third on providing an opportunity for the board to discuss, and to ratify or amend as appropriate, a completed draft long-range plan based on the conclusions reached at the first two sessions.

1.3 This process only works if considerable supporting work is undertaken between the three sessions by an ad hoc planning group comprising board, staff and, as appropriate, consultants, and if the timetable takes this need for ancillary work outside the three high-level sessions into account. The process usually requires four to six months from inception to the final board ratification of the written planning document.

1.4 It is necessary to ensure that the planning process is informed by a realistic assessment of the external environment in which an organization is operating and by the views of stakeholders beyond board and staff as to the strategic issues facing the organization. This includes funders, community leaders, and the audiences and constituencies that the organization aspires to serve.

1.5 The planning process should be oriented towards addressing the substantive issues facing the organization and organizations should be wary of an abstract preoccupation with drafting and word-smithing. A more detailed note to the long-range planning process, the pitfalls of planning, and how they can be avoided, can be found in Chapter 3, "A 'How To' Guide for the Long-Range Planning Process."

2 Long-Range Planning – Timeline

2.1 Below is a schematic timetable for a long-range planning process.

Week 1 Commissioning briefing

Weeks 2-6 Establishment of ad hoc planning group.

Agreement on research tasks.

Preparatory work includes:

- Solicitation of views of external constituents.
- Solicitation of views of board and staff.
- Environmental scan and research.
- Development of organizational history.
- Identification and agreement of key issues.

Week 8 First strategic planning session: mission and program.

Ancillary support work identified and conducted.

Week 12 Second strategic planning session: organizational, financial and facilities issues.

Ancillary support work identified and conducted.

Draft Strategic Plan prepared.

Week 16 Third strategic planning session: ratification of long-range plan.

Upon completion of the formal planning process, effective implementation and monitoring of progress against the agreed 'action plan' should be ensured.

3 A 'How To' Guide for the Long-Range Planning Process

Managing the Process

3.1 Set up an ad hoc time-limited steering group for the long range planning process. You don't have to use – and there is often some merit in not sticking to – an existing standing committee, assuming there is one. The steering group's responsibilities are procedural – to make sure the process happens efficiently and equitably and that board, staff and relevant stake-holders know what is happening (why and when) and are committed to the process.

3.2 The steering group may comprise the whole board and senior management. More usually it comprises a subset of board and senior management. There are pros and cons of both approaches. For smaller organizations with underdeveloped subcommittee structure, it is often a question of 'all hands to the pump'. For more developed organizations, a 'steering group of the whole board' is often simply impractical. Typically the steering group comprises a sub-set of board members; the size varies by organization but typically is no fewer than four and no more than twelve trustees. The chair of the board should be a member but not necessarily the chair of the planning group.

3.3 It is important that the steering group understands the resources that will need to be dedicated to the long-range planning process (staffing the exercise, research, consultation, developing an action plan, writing up the plan, etc.) and that the process is prioritized by the board. A rhetorical commitment without resources to move the process forward – very common – saps time, energy and good will.

3.4 The ad hoc long-range planning committee is charged with: i) leading the organization through a long-range planning process; ii) involving board members, staff, key constituents and other significant groups; iii) providing a clear understanding of process and deliverables; and iv) developing the goals, objectives and strategies designed to fulfill that vision; and v) report out to the full board on the progress of the planning process. The steering group should develop the timeline for the planning process, decide whether to use outside facilitators, provide a written draft long-range plan to the board for consideration and (as appropriate) approval, and ensure implementation and appropriate reevaluation of the plan.

3.5 The steering group should include:

- Key board members (chair, chairs of subcommittees in the event that these exist, other influential or interested board members, etc.);
- Key staff members/leadership (CEO, heads of program/artistic content, finance, marketing, etc.);

- Other bases usefully covered: those who have knowledge of the history of the organization, artistic insight, market, financial, nonprofit management experience, etc.; also, representatives of any ‘factions’ whose active support is required for successful implementation. (In conflicted organizations there is a temptation to make the steering group exclusive rather than inclusive. This is usually fatal to the exercise.)

3.6 Some consultants suggest that the steering group may include external constituents/stakeholders. However, our view is that this militates heavily against authentic discussion of important issues. Stakeholders can be involved in a constructive and meaningful way without direct involvement. At the end of the day, responsibility for the long-term direction and success of the organization lies with the board and leadership – no one else.

3.7 The steering group has to hold authority and respect to be able to make decisions on behalf of the organization. It should ensure that the full board ‘buys into’ the process (either through direct participation or through vesting full authority in sub-group). The steering group’s remit needs to be ratified by the full board at the appropriate point.

3.8 Therefore:

- The board should explicitly agree to undertake long-range planning;
- The board should approve the composition of planning group and process;
- The board should receive regular progress reports and ratify key decisions.

3.9 The chair of the steering group is responsible for:

- The integrity of the process;
- Maintaining momentum;
- Ensuring that responsibility for specific planning tasks is assigned and that the planning process is accorded appropriate priority and resources;
- Ensuring that the planning process is inclusive of all significant viewpoints;
- Delivering the draft long-range plan;
- Ensuring the generation of timely progress reports to the full board.

3.10 The skills for the ideal chair of a committee include:

- An ability to work well with others and capacity to lead the overall work of the team;
- An ability to think strategically and assimilate a range of information;
- Imagination, openness to new ideas, and ability to create a healthy, open environment;

- A knowledge of and commitment to the organization and the planning process;
- An ability to focus on difficult subjects and to ensure that they are broached in constructive ways;
- An ability to create a flexible, iterative process. (The process will keep coming back on itself and the chair needs to push thinking forward.)

3.11 The group may choose to use a consultant to facilitate the process. This can liberate the chair to take a more substantive and participatory – as opposed to procedural – role, assist in facilitation, and provide momentum and moral support.

Preparation

3.12 The chair, CEO and, as appropriate, consultant are responsible for preparing background material for the exercise. This should comprise:

- Summary of views of external constituents – funders, collaborators, regulators, partners, etc. Often done via anonymous questionnaire or focus group.
- Summary of staff and board views – an opportunity for individuals to articulate their perspective on vision and goals, and what they hope the plan will provide. Often done via questionnaire, group meetings, etc. Avoid overkill on the one hand. Avoid disenfranchisement through cursory exercise on the other.
- Collation of information on the environment in which the organization operates. Facts (not perceptions) on:
    - Key trends in service/program;
    - Competitive forces;
    - Technological advances;
    - Funding/financial issues;
    - Regulatory/political factors;
    - Any benchmarking data.

This area – trends in the wider operating environment – is often neglected by cultural organizations and their planning processes are correspondingly solipsistic and imperiled in the long run!

- Short overview of the history of the organization – how it has developed (headlines), what it currently does, who it serves and how, financial trends and organizational structure.
- An overview of the key issues facing the organization. This helps to focus the process on the highest common factor rather than the lowest common denominator.

3.13 This material needs to be bundled up into a concise briefing package and circulated to all members of the team that will be involved in the planning process in advance of their first meeting.

The Timetable

3.14 Set a schedule of three full planning retreats to include the full board, planning and executive team:

- Initial retreat – confirm/amend mission; fit between mission and current program; constraints, opportunities, resources and environment; key issues and options.
- Second meeting – confirm preferred underpinning strategy and strategic options; review financial and organizational implications of preferred strategy.
- Third meeting – for board formally to review and to sign off on draft long-range plan.

3.15 The process works only if there is investment of time and effort between meetings in preparation of materials; otherwise the process does not move forward.

3.16 Logistics set the tone: venue, refreshments, timely circulation of papers, etc. Meeting off-site and away from 'normal business.'

Initial planning session – retreat

- Revisit and affirm or revise mission and strategic program: core values, purpose, goals, and vision.
- Opportunity to generate lateral insights into how mission can be pursued: alternative program structure, new areas of development, dropping some areas of program, etc.
- Avoid the process of planning being held hostage by financial issues at this stage. There is an opportunity for 'structured dreaming' here.
- If the mission and key goals cannot be reconciled with endemic issues facing the organization (or a process of reconciling them explored), the organization cannot continue with planning. It is imperative that this be addressed.
- In the worst case, the organization's raison d'être is no longer viable (for example, because others are offering it at a lower cost or higher quality and/or demand from core audience will not resurge); alternatively, lateral thinking may need a bigger push.

Outputs of initial retreat:

- Refined understanding of mission, values, vision for the future, key issues that have to be addressed as part of that, broad understanding of resource implications – that is, a skeleton of the strategy;
- Agreement about what the organization needs to know about the realization of the goals and the challenges facing the organization before making a decision about how to proceed;
- A synopsis of proceedings that includes briefs to subgroups (with staff support) to generate and test options in key areas.

Second planning meeting

- Receives reports on key strategic options in each area identified at initial retreat with particular focus, when relevant, on organizational, financial and facilities issues. If necessary or desired, subcommittees or ad hoc taskforces can come back with recommendations on how to push an idea forward, but they should test validity of views empirically where practicable. Program options, for example, should be analyzed by reference to their relationship to i) mission; ii) risks and rewards; iii) resource implications and inputs.
- Decision should be reached during the second session about what the organization will and will not pursue – some goals may be discounted. Options may be closed down.

Output of second planning retreat:

- A consensus around a long-range plan – covering mission, environment and goals – suitable for development of an operational plan. It is the overall responsibility of the executive team to synthesize all the implications of the different elements into an operating plan.

Third planning meeting

- Considerations and amendment/ratification of 'written up' long-range plan, including process for implementing a detailed operational plan – an 'action plan' – for ratification by board.
- The action plans cover: goal, tactic or proposed course of action, targets for achievement, status (level of progress/distance from goal), resources, responsibilities, timing. Avoid fluff, filler and verbiage. It is helpful to organize the plan in Excel so it can be sorted by area.
- Following the above, there should be formal reporting back to stakeholders of the outcome.

3.17 The long-range plan is a working tool. It should delineate specific tasks, responsibilities, and timelines against which to measure progress. It provides a structure within which to address issues as they arise – for example, the loss of a key funding stream or the opportunity to attract an extra $50k annually. It indicates priorities and clarifies the means for testing feasibility.

4 Long-Range Planning—A Reality Check (and process checklist)

Why plan?

- To inspire people to give, join and serve; it builds confidence and support
- To develop criteria for choices
- To prune and focus the natural proliferation of activities
- To clarify board and staff roles
- To help the organization to remain relevant, responsive and dynamic
- To improve quality decision making
- To provide stability and clarity of purpose

What's good timing and what's bad timing for a planning process?

4.1 It is difficult to plan when: i) major staff/board changes are looming; ii) immediate financial crisis dominates thinking; or iii) when the process is dominated by considerations of fundraising (and therefore the best case for the outside world replaces honest introspection).

Preparing for the retreat

4.2 Preparatory materials should include a paper, which might include the following:

- lines of inquiry:
  - Strengths, weaknesses, opportunities and threats (SWOT)
  - Constraints, Opportunities, Resources, Environment (CORE)
  - What are your sources of pride/embarrassment?
  - What's your greatest satisfaction as a staff/board member?
  - What's the greatest strength of the organization?
  - What is the organization's most troublesome weakness?
  - How do you rate the following issues in terms of their current importance to the organization?
  - What subjects would you wish to be sure are raised at the session?

4.3 The environment:

- It's wild out there! Guard against solipsism by getting the facts on:
  - Audience trends;
  - Funding trends (public and private);

- Economic growth trends in the region;
- The competition;
- The supply chain;
- Technology;
- The labor market;
- Benchmark data on best practice in your field elsewhere in the US.

- Key issues: short summaries (a couple of paragraphs) of not more than ten of the issues most frequently mentioned (and identified by the chair or consultant as appropriate). State in a way that encourages discussion/debate rather than closes it down.
- A brief history of the organization – on paper – is often salutary.

4.4 If you get stuck:

- Park the issue – it sometimes drives away by itself
- Develop broader criteria
- Brainstorm – imagination and generation of alternatives/options

4.5 Common traps and suggested routes for avoidance:

- Trap: External environment ignored
- Solution: Background paper on environment and specific session addressing issues to which it gives rise early in first retreat
- Trap: No context or follow through
- Solution: Process of planning agreed in advance of fact; regular reporting of progress against plan
- Trap: Planning overload
- Solution: Realism at planning stage about timetable and resources
- Trap: Not sufficiently action oriented; Responsibilities unclear
- Solution: Action steps recorded with individuals responsible. Chair guards against circular discussions
- Trap: Strategic plan is seen as external/presentational document rather than an internal tool
- Solution: Chair/facilitator makes clear that fundraising plan is second order, though it may have provided context for planning, and that honesty and realism are required
- Trap: Plans divorced from financial reality
- Solution: See below on the timing of introducing financial considerations into the process…

- Trap: Staff concerned about low board knowledge levels
- Solution: Involve staff in preparation of material and follow through; avoid ‘parent-child’ relationship with staff; use their knowledge and deploy an ‘adult-adult’ process
- Trap: Impatience, planning fatigue, skepticism
- Solution: Authoritative, confident chair and early buy-in to the full process by the committee
- Trap: Belief that organization is too fragile to plan
- Solution: Divorce planning process from arena of tackling immediate crises
- Trap: Don’t know what to do (in terms of process)
- Solution: Use experienced consultant

4.6 Use of a consultant:

Pros:

- Objectivity, external facilitation – desensitizing difficult issues, responsible for driving process forward
- Additional resource (research, advice, sounding board)
- Additional perspective
- Responsible for momentum (and, ideally, familiar with process)

Cons:

- $$
- Consultant skills may limit the development of skills within staff and board (can also promote their development)
- Should have knowledge of organization’s field if more than simple facilitation of event involved
- Distinguish between someone who facilitates the retreat and someone who facilitates the entire process. Don’t get one and expect the other!

4.7 Outputs of long-range planning process:

- A consensus over strategic direction
- Often the result is ‘less done better’
- A framework for decision making
- A better balanced relationship between resources and goals
- Some documents: a long-range plan and an operational plan
- A multi-year budget

4.8 Then what?

- Evaluation
- Revision
- Reporting out
- Implementation

4.9 What makes retreats work?

- Ambiance
- Ground rules
- Preparation
- Structure

4.10 Lateral thinking: a retreat is an opportunity for intelligent dreaming. How do you do it?

- Scenario planning – see www.gbn.com
- Brainstorming / 'brainwriting'
- Thinking hats
- Nominal Group Technique
- Kiva technique
- Synectics, etc.

4.11 Terminology / Glossary

- Mission: brief statement of overall purpose, values, vision and goals. It should identify what drives the organization, the outcomes the organization aims to achieve and what, if anything, is unique about the organization.
- Values: the principles or central beliefs that guide an organization.
- Vision: a long-range 'picture' of what the organization aspires to be in five, ten, twenty years time.
- Strategic goals: the central aims of the organization. These goals identify how the organization is going to work towards its vision for the future.
- Objectives: specific action steps that describe how to achieve the goals. SMART (specific, measurable, attainable, realistic and timed).

4.12 When and how should financial considerations be brought to bear on strategic thinking without crushing the life out of things?

- Basically, the chair (and, if relevant, the consultant/facilitator) needs to keep financial context present in the discussion, without polarizing the group into 'dreamers' and 'accountants'. This is aided by:

- Basic financial trends (earned/unearned income and expenses) are presented in background materials.
- Basic development/contributed income trends are presented in background materials.
- Within the process, consideration is given explicitly to financial goals (building balance sheet, retiring debts, developing new income streams, etc.).
- Consideration is given explicitly to development capacity.
- Consideration is given explicitly to goals for financial management at the operational level.

4.13 Some concluding points.....

- Board and stakeholder buy-in is necessary.
- Friction is inevitable if real issues are being dealt with.
- Constituency views should be sought.
- This is not regular business and should be distinguished from it.
- The results of the process should turn into regular business.
- Stamina is required: parts of the process are dull and irritating.

5 Appendix 1: The Importance of Capital Structure in Long-Range Planning

5.1 In retrospect, long-range planning processes are often seen by participants as having focused on refining mission and exploring programming ambitions without having addressed the relationship between these ambitions and organizational and financial capacity. The planning exercise becomes, in effect, divorced from operational reality, and the energizing feeling of euphoria that an up-beat planning retreat can generate is followed by a sense of let down as staff and board grapple with the gap between aspirations and operational reality.

5.2 Like three points of a triangle, it is difficult to make changes to programming, to organizational capacity, or to financial capacity without both of the others moving. While there is a great deal of attention given to the relationship between organizational capacity and artistic program in current thinking about nonprofit management, there has been much less attention given to the impact of overall capital structure on program and organizational capacity – the distribution, that is, of an organization's resources between working capital, investment in buildings, endowment and so forth.

5.3 Individual components of an organization's capital requirements – for example, the need for working capital, or the need to invest in facilities or equipment – can often dominate board and management thinking. But these elements are not always placed in the wider context of this triangular relationship between capital structure, mission and organizational capacity. The planning process provides a context for addressing this.

5.4 Many instances of technical assistance, strategic planning and capacity building have, in retrospect, failed to realize their promise – for example, initiatives to improve marketing or outreach or to undertake facilities projects – because of this tendency to focus on the relationship between organizational capacity and program while neglecting underlying capital structure. No amount of attention to, say, strategic marketing, is going to make things come right, if your organization is so fundamentally short of working capital that you cannot lift your head above the problems of next week's payroll.

5.5 Indeed, inadequate working capital – the "apex" of an organization's capital structure – is probably more corrosive to organizational effectiveness in the nonprofit cultural sector than any other single factor. It means that the short term crowds out the longer term, and that cash flow dominates planning, with creditor management absorbing the time, money and emotional reserves that are needed for longer-term program building. The ability to take informed risks – essential to the realization of the mission of most arts organizations – is compromised, with the result that conservative programming dominates or that the organization has to 'bet the house' every time it wishes to under-take programming (or another initiative) involving a significant degree of financial risk.

5.6 The reasons for this neglect of the importance of financial capacity go very deep.

- One is that, as a whole, the non-profit sector tends to rely heavily on the energies and enthusiasms of its executive and non-executive leadership. There is a belief in the sector that energy, will-power, stamina and enthusiasm can overcome all obstacles, and that where it does not, this is rooted in some sort of personal failing. The idea that an inappropriate organizational and financial structure can somehow subvert an organization's ability to meet its objectives can seem overly deterministic, fatalistic even.
- A second reason is that there is no healthy "natural equilibrium" in the capital structures of nonprofit organizations. Left to its own devices, the balance sheet of an organization will not necessarily settle down in a form that best supports mission and enhances organizational capacity. All other things being equal, it will tend to do the opposite.

5.7 Organizations, therefore, need to use the planning process to analyze their current structure, assess the appropriate structure, and then develop an explicit strategy for moving from one to the other.

5.8 How, then, does one use the long-term planning process to go about developing a more comprehensive and systematic approach to the asset structure of an organization?

- The first step may simply be to make capital structure a more explicit object of board and management attention in the context of its longer term planning, rather than allowing it to be simply the aggregate result of other, unrelated decisions. This helps to develop a shared understanding among board and management of the operational implications of the organization's assets and liabilities.
- A second step – in developing that long-term strategy – may be to look more directly at the underlying financial character and logic of the 'business' that you are in. What is relevant here is not that an organization is a museum or a dance company or a symphony orchestra per se, but that the business in which you operate requires a certain amount of working capital, that there is a particular pattern of cash flow over the week, month or year, particular

requirements for capital investment, etc. Presenting theater companies have, structurally, more in common with, say, churches, in terms of their capital structure and balance sheet, than they do with performing arts companies that do not own a performance space.

- Third, one can work systematically down the "pyramid" of the capital structure, and address requirements under each category.

5.9 Reserves set aside for specific purposes are often important in smoothing out the impact of the business cycle – for investment in new productions or equipment, or for meeting the unpredictable outcomes of risk taking in specific areas. Short and long-term debt – and access to lines of credit – should also be seen in this context.

5.10 Capital invested in equipment and buildings presents another set of issues. Buildings often represent the most significant capital investment undertaken by nonprofit organizations. Their creation and operation have a significant impact on all aspects of capital structure (particularly working capital requirements) and on organizational capacity. And they are, in addition, a highly illiquid investment.

5.11 And, last, there is the role of endowment. An endowment is not a "silver bullet", the existence of which takes away the need to worry about the other components of your capital structure. It is simply another component of that structure and, therefore, best understood in that context. Endowment needs (and in the context of fundraising, an endowment "case") can best be understood by looking at the other elements of the actual and desired capital structure and then by establishing how best to close the gap between the two. Contributed income and earned income have significant parts to play alongside endowment. But it is often endowment that supports sustainability where operations yield no "natural equilibrium."

6 Appendix 2: The Relationship Between Strategic and Facilities Planning

6.1 A very simple model of the successful development of a new facility is that it rests on three building blocks: a strategic block, a financial block, and a physical block.

6.2 The strategic block comprises:

- A clear vision of the mission and program;
- A clear idea of the capital budget and the level of any revenue support which is likely to be available, if any; and
- The organizational capacity and experience to manage a professional team.

6.3 The financial block comprises:

- Market analysis—size, characteristics, likely penetration by the new facility, price sensitivity, marketing strategy (and audience development strategy), etc.—that is, demand;
- Analysis of availability of 'product'—that is supply;
- Income and expenditure breakdown and projections;
- Analysis of main financial sensitivities.

6.4 The physical block is led by the design team (comprising project manager, architect, engineers, etc.) and a cost consultant. They translate the strategic vision into a program and then a design of increasing specificity, addressing:

- Building configuration and acoustic specification;
- Technical equipment;
- Approach to architectural mass and character;
- Site assembly and planning approval strategy;
- Capital costing.

6.5 Iteratively, in this scenario, the client, the business planner (whether in-house or external), and the design team refine the strategic vision and explore its financial and physical consequences. Where the client's aspirations generate unacceptable physical or financial consequences, the vision is revisited or tweaked. Where the optimal physical configuration has unpalatable financial consequences (or vice versa), the client decides what trade-offs are acceptable and what are unacceptable.

6.6 Unfortunately, you probably get to work on a new building where things work out so smoothly only a couple of times in your life. It requires a strong and informed client. A strong client is one who is:

- Confident—politically and financially empowered;
- Clear—about priorities;
- Committed—to achieving its goals;
- Continuous—with infrequent changes at the top;
- Competent—informed about the process on which it is embarking.

6.7 There are many systemic (that is, pretty well inevitable) reasons why clients 'fall short'. Below are some of them:

- The impetus behind many new arts facilities is – for better or worse – as much related to urban renewal, economic regeneration or civic pride as to the arts. The programming vision is therefore sometimes less well developed than one might expect;
- The client is often, in these instances, multi-headed, and lacking a clear hierarchy or priorities;
- Clients are rarely experienced in the process of program development, suspicious of external professionals and lacking either the trust essential for collaborative planning or an understanding of the order in which issues need to be addressed;
- Few clients have a clear capital budget at the inception of a project as they are in the process of raising funds and generating political support for the project and the development of a scheme is integral to the fundraising and PR exercise;
- Few clients can predict the level of likely revenue support for which they should be planning. Most are to greater or lesser extent in a state of budgetary crisis. This is particularly true of regional theatres in the UK today;
- Clients usually lack the staff, management or board resources to be able to invest in project development until they have developed the project—a logical conundrum.

7 Appendix 3: AEA's Experience in Long-Range Planning

7.1 AEA Consulting specializes in strategic, operational and facilities planning for cultural organizations. We work on an on-going basis with the boards and senior management of cultural organizations and their funders, helping them to define, plan and achieve their long-term organizational goals. Our areas of expertise include strategic planning, facilities planning and long-term audience development.

7.2 AEA's approach to long-range planning is informed by our experience with organizations in the cultural sector in the United States and Europe over the past decade. In addition to facilitation and analytical work on the planning process, AEA has developed and taught strategic planning for cultural organizations in a number of contexts, for such organizations as the Arts Council of England, National Arts Strategies, and the Nonprofit Finance Fund.

7.3 Our approach to long-range planning is also informed by our depth of experience in facilities planning and 'best practice' financial management for arts organizations – and vice versa. Indeed, our approach to both facilities planning and business planning is to place them firmly in the context of an organization's longer-term strategic ambitions.

7.4 Some of AEA's strategic planning clients include: The Frick Collection, San Francisco Opera, Jazz at Lincoln Center, the Milwaukee Art Museum, El Museo del Barrio, Missouri Botanical Garden, The Drawing Center, PEN American Center, Sacramento Symphony, Academy of American Poets, the Detroit Institute of Arts, and The Hispanic Society of America. More information on AEA can be found at: www.aeaconsulting.com.