

OPERATIONS Overview 2018 to 2022

Mission *To create opportunities for participating in the joys of dance and music from around the world*

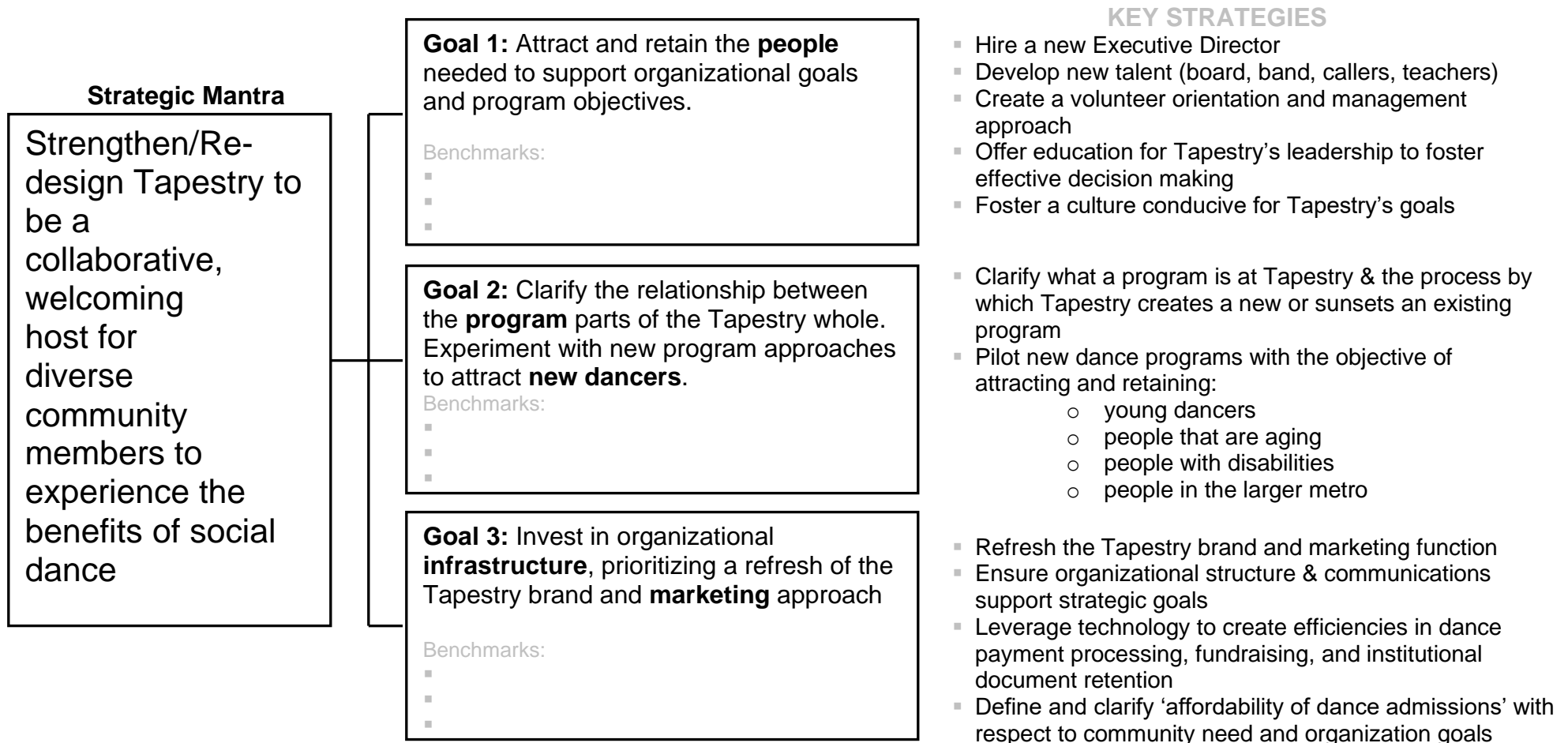
1. Challenges identified by the Board of Directors 2017-2018:

- Income decreasing – admissions, donations, memberships, grants.
- All programs, events, and renters working in own silo – little standardization of operating procedures.
- High Staff turnover over the years – poor communication between board, staff, and volunteers.

2. Board of Directors hires Propel for Non-profits - Findings summary:

Board members Carole Wilson, Midge Olsen, Leslie McKenzie very active in this process.

Tapestry Folkdance Strategic Plan 2019-2021



OPERATIONS Overview 2018 to 2022 (con't)

3. Board Actions taken 2019

- Staffs' job descriptions rewritten to ensure professional level applicants. 2018 staff unable to fulfill the requirements.
- Executive Director with extensive nonprofit administration experience hired - Ann Mosey; 32 hours/wk.
No on-boarding was provided. Most files were found to be mismanaged on-line, in file cabinets and in many boxes.

2019-2020 Executive Director Actions – Ann Mosey

1. **Staff Hired** – Non-profit professionals Mark Richardson, Finance Assoc. and Amy Sutherland, Marketing Assoc.;10-15 hrs/wk.
Staff spent the year creating standard operating procedures and implementing new outreach strategies. Additionally, finding and cleaning up historic records: contracts, member and donor lists, finance records (on-line files only went back to 2014), tax forms, etc. It took nearly 6 months for Mark to find the last 2 years financial records that could be validated as truthful. Amy found it more efficient to build a working web site from scratch (two volunteers and the previous marketing person had two different ones going). Amy also designed new marketing materials and strategies (no more colored paper cut outs). Her work saved over \$7,000 in marketing expenses (see cancelation of City Pages contract).
2. **Executive Director 5 areas of focus:**
 1. Hire and onboard staff.
 2. Standardize Operating Policies and Procedures - office, programs, events, renters, financials.
 3. Finances: Annual fundraising plan and Finance Committee established. Talent payrates, event budgets, and Rent rates standardized.
 4. Marketing and Outreach Strategies newly designed and implemented.
 5. Program and Rental Development**.
- a. ****New programs:** Seniors Dance Joyfully, partner with LF Healthy Seniors. Parkinson Dance, partner with Natl Parkinson Assoc. Teen Moms (covid stopped this). MacPhail School of Music/ECD partially completed due to covid.
- b. ****New renters:** Heart of Dance regional offices. TLC Line Dance. Evolution Latina Dance Co.

2020-2021 Covid

1. **Staff hired** – Professionals Heidi VanShooten, Finance Associate and Linda Seebauer-Hanson, Marketing Associate;15-18hr/wk. NOTES: Mark retired, and Amy found the behavior of many program and event leads too disrespectful to continue.
It took over 9 months to make a hire – less than 5 people applied in those months.
2. **Financial Consultant hired** – Lisa Peterson, Streamline Consulting (a Quickbooks expert) cleaned several years of financial records, reconciled current accounts, and designed effective policies and procedures. This was essentially an audit and design of best practices. Cost for 3 months work was just over \$1,000 of what it would have been to pay a staffer 9 months.
3. **Covid Task Force engaged** – held weekly meetings to review covid data, implement, and communicate safety measures.
4. **On-line streaming implemented** of select Tapestry dances and a concert series implemented. Received grant to fund these initiatives.
5. **Projected budget developed** – will we be opened? Income estimates based on 75% participants returning.

2021 Key Executive Director initiatives:

1. **Job descriptions of Program Volunteers co-created:** Executive Director, Steering Committees, Program Advisory Committee, dance Volunteers – clarified duties and lines of communication. Facilitated by Sondra Reis, Virtualogy, LLC. **Volunteer Handbook** written.
2. **Organizational Chart co-created:** ED with Board and Program Volunteers – decision making pathways and lines of communication clarified. Shared with Program Leaders, communicated in enews, and **visual chart** posted in building.
3. **A new business model is needed.** ED makes the recommendation to the board that a new business model for the organization overall is needed - the current model is not sustainable. Past 8 years of records show a continual decline in attendance, participation, donors, members. Additionally, the aging out of the founders, volunteers, instructors, callers, sound tech etc. is of concern. Ann outlined the components of an effective revisioning/strategic plan:
 - i. Evaluation of current model (Strengths, Weaknesses, Opportunities, Threats),
 - ii. Tapestry community input (leaders, founders, staff, board (past and present),
 - iii. Review of local market options (programming, pay and rent rates etc),
 - iv. Select options for new model (Strengths, Weaknesses, Opportunities, Threats),
 - v. Projected budget for new model (staff, talent, instructors, rentals, inflation...)
 - vi. Implement new model,
 - vii. Ongoing evaluation and refining new model (Strengths, Weaknesses, Opportunities, Threats),

2021-2022 Re-opening

1. **Board of Directors Committees formed:** Executive; Finance; Board Effectiveness; Recruitment; Policies and Procedures. Annual Work Plan of Board Tasks created. Facilitated by Jennifer Sawyer, BoardBos.
2. **Transfer of operating systems** to flipcause.
3. **Clean-up technology systems** - T4 Technologies was hired in September 2022 as Tapestry's tech support. T4 is a small tech support business focused on small nonprofits. Sometime in 2018 or 2019 the board ok'd a volunteer to set-up technology to support day to day operations. At that time, Executive Director Dana H. expressed several concerns to the board. There were several issues the board was having with staff at that time thus, technology concerns were not addressed. When Ann Mosey was hired in 2019, and after working with said volunteer for several months, Ann communicated to the board that reliance on one volunteer for upkeep of the technology used for day-to-day operations should not be dependent on a single volunteer. Other issues communicated were that the volunteer was not skilled in transferring instructions on how to use the systems, nor were they willing to hear the needs expressed by staff. Ann then requested a tech team of volunteers be set-up. The volunteer who initially set-up the technology systems agreed to make that happen, but in the end, they did not.
4. **Programs back in building.** Ballroom, Contra, English Country, International, Adv, International, Israeli (new), Seniors. Waltz and Family did not return as of Nov. 2022 – no reason given.
5. **Renters back in building: Legacy:** Fligmegaerie, Royal Scotts, Morris (2), Bells of North, Hungarian.
Long-timers: Zumba (Sadie and Chari both); Karate; Saturday Modern; Dance Church (pays more rent & sound equipt); Adv ECD Daniel Beal; USA Dance; Heart of Dance. **New:** Adult Modern; Qigong; Phoenix Chinese; Raj Zouk; Ballet Lauren; Shake Your Bones; Balboa; Mindful Movement; 5 privates.
6. **Special events back in building:** Annual Party; Eds Party; Open Streets; Star of North; International; Call of Loon 2023. Did not do State Fair – covid.
7. **Business Model Development Group established:** Hollie Benton, Ted Hodapp, Lisa Leedham. *[Submitted 11-2022 AM]*