



Strategic Plan 2016-2021

Prepared By:
Fayetteville Symphony Orchestra
Board of Directors

I Introduction

The Fayetteville Symphony Orchestra was founded in 1957 as a volunteer community orchestra. It has grown to a professional orchestra comprised of more than 75 part-time, musicians. We are fortunate Christine Kastner has been our President & CEO since November, 2011.

The FSO is governed by a 18 member Board of Directors each of whom may serve up to two three year terms. A majority of the work of the Board is performed in committees and presented to the board for approval. Four full-time and one part-time staff manage all administrative and operational functions for the organization.

The board of directors and orchestra management recognize that the FSO cannot succeed doing business as usual. Funding sources are changing and audience demand for the arts has and continues to change. Providing excellent artistic performances and products is not a guarantee of success. To address these issues, we have engaged in a strategic planning process. Implementing this Strategic Plan requires the same collaborative effort utilized in the initial organization process.

This strategic plan has been developed to identify strategies, objectives and metrics that will enhance the ability of the FSO to fulfill its mission and achieve success in accordance with its vision.

Status of the objectives and metrics will be reviewed and updated quarterly and reported at Board of Director meetings. Changes deemed necessary will be made at the Executive Committee or Board meeting level. The overall strategic plan will be updated on an annual basis and presented to the FSO Board of Directors for approval.

We invite you to learn more about our plan which is presented in the subsequent chapters of this document. The FSO appreciates your trust and support.

II Executive Summary

THE VISION OF THE FAYETTEVILLE SYMPHONY ORCHESTRA

The vision of the FSO is to be recognized as the premiere professional provider of symphonic music and an essential resource to the Fayetteville, NC region's cultural, educational and economic development.

Vision: The vision is what the FSO will achieve in the future when we are successful at completing our mission. The vision includes the avenue for which change, growth and goals are to be attained. The vision is inspirational and provides meaning to the organization. The vision for each theme directly supports the overall vision of the FSO.

THE MISSION OF THE FAYETTEVILLE SYMPHONY ORCHESTRA

The mission of the FSO is to Educate, Entertain, and Inspire the citizens of the Fayetteville, NC region as the leading musical resource.

Mission: The mission of the Fayetteville Symphony Orchestra is to Educate, Entertain, and Inspire the citizens of the Fayetteville, NC region as the leading musical resource. The mission is the reason we exist. It includes the overall purpose of the organization and what needs to be done to realize our vision.

THE GOAL OF THE FAYETTEVILLE SYMPHONY ORCHESTRA

The goal of the FSO is to excel as the premier contributor to the artistic enrichment of this region and attain prominent recognition on a regional, national and international level.

Goals: The theme specific goals outline our plan for accomplishing the mission. Each theme includes goals that directly support the overall FSO Plan.

III Elements

The strategic plan encompasses the following elements: Objectives and Metrics

Objectives: Every goal must be supported by objectives. Objectives must be specific, measurable, attainable, relevant and time-bound (SMART). Objectives drive the strategic success of the organization.

Metrics: Metrics measure the success achievement of our objectives. Specific metrics are identified for each objective. Identified metrics include the evaluation method (survey, statistics, etc.), frequency of measurement (weekly, monthly, yearly, etc.), and entity responsible (committee, subcommittee, individual, etc.)

IV Usage

The plan will guide the FSO on initiatives designed to help achieve long and short term strategic goals and objectives. The plan will be utilized by FSO Board Members, administrative and artistic staff, orchestra members and all other stakeholders for all planning purposes.

Implementation of strategies defined by the strategic plan will be accomplished through prioritized projects and tactical planning. Each of these projects will have established goals, objectives, timelines, solutions for challenges and metrics to evaluate success or progress.

Status of the objectives and metrics will be reviewed and updated on a regular basis and reported at Board of Director meetings. Changes deemed necessary will be made at the Executive Committee or Board meeting level. The overall strategic plan will be updated on an annual basis and presented to the FSO Board for approval.

V Core Values

The following five statements describe the way we do business at the Fayetteville Symphony Orchestra:

1. Artistic and Organizational Excellence

Quality sets us apart.

We set and maintain high standards for our people and our programs. We continually strive for artistic excellence in all aspects. We adhere to the highest ethical standards of personal integrity and in all interactions with the community. We look to every staff member, board member, musician, and volunteer to share in the responsibility for developing and maintaining a positive environment in everything we do. We are known for producing symphonic music of the highest quality, honoring our commitments and for being a thriving and integral member of the cultural vibrancy of the region.

2. Sustainability

We acknowledge the essential link between financial stability and artistic growth.

We strive for financial stability and artistic growth through excellent symphonic performances, educational outreach programs, community liaison, cultural identity and effective, long-range planning. We strive to

recruit and retain the most accomplished and dedicated musicians, administrative staff, and board members. We encourage creativity and initiative in all aspects of the organization. We place a high priority on educational opportunities, recognizing the community as a vibrant and ongoing source of sustainability in the form of patronage, musicians, volunteers and board membership. We promote the understanding of our organization's values and we continually strive to be a source of pride to our community.

3. Constituent Satisfaction

Our constituents are our number-one priority.

We maintain the highest level of commitment to all our constituents. We strive to listen and respond to our constituents' needs. We endeavor to understand the perspective of the audience, patrons, community, staff, musicians, board, volunteers, and students in all decisions we make. We encourage the use of local resources. We respect, support and collaborate with other arts organizations while always striving to be the leading musical resource in the region.

4. Innovation and Creativity

We encourage creativity and innovation in all aspects of the organization.

We maintain artistic excellence through the use of innovation, creativity and collaboration in all aspects of the organization. We seek to form artistic alliances with other artistic communities to provide our constituents with a broad range of creative experiences that educate, inspire and entertain the community. We approach collaborations as partnerships characterized by joint participation and cooperation. We encourage creative and innovative ideas to meet financial, logistical and artistic challenges.

5. Education

We believe music education to be an integral part of life.

We see education of young people as vital to the sustainability and artistic growth of the organization. We see education as a path to inspiring future symphonic musicians, symphony staff, volunteers and board members. We see the role of the symphony as one that promotes understanding of other cultures by providing a variety of musical experiences that appeal to diverse audiences. We believe that music programs enhance the quality of life in communities, and contribute to the education and development of children and the community as a whole.

VI Strategic Goals

The following goals will enable the FSO to successfully fulfill its mission. The individuals and/or committees primarily charged with the responsibility for executing outlined goals are delineated in the *italicized text*.

- 1. Maintain a secure and sustainable financial base**
- 2. Consistently produce symphonic programs of exceptional quality**
- 3. Recruit and retain gifted staff, board members and volunteers**
- 4. Attract and maintain an increasing and diverse audience base**
- 5. Incorporate exceptional educational and outreach programs**

1. Maintain a secure and sustainable financial base

A. Strategy: Review financial policies annually

(Internal Operations Committee)

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|--|----------------|
| 1 Determine balance in all accounts to verify cash reserve | Jul-16 |
| 2 Update Bank signature cards annually | Jan-16 |
| 3 Maintain security of credit cards, blank checks and petty cash | Jan-16 |
| 4 Maintain safe in office for important permanent documents | SOP |
| 5 Ensure compliance with tax laws | Sept-16 |
| 6 Maintain Board oversight of financial statements | SOP |

Metrics:

Establish Standard Operating Procedures (SOP's) to manage:

- Bank signature cards
- Safe in office and important documents
- Compliance with tax laws
- Maintain Board of Director oversight of financial statements

B. Strategy: Cash flow projections

(Treasurer, CEO)

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|---|--------------------------|
| 1 Maintain the spreadsheet to track cash flow | Quarterly updates |
|---|--------------------------|

Metrics:

Cash flow to be reviewed by Treasurer and CEO

C. Strategy: Track 5-year history of season ticket sales

(Internal Operations committee, CEO, Office Staff)

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| Create spreadsheet using data from QuickBooks and database system | Jun-16 |
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Metrics:

Maintain Spreadsheet

Results to be reviewed by Internal Operations Committee, CEO and Office Staff

D. Strategy: Establish annual calendar of events and timeline for projects for all fundraising.

(Development and Hospitality Committee, CEO)

Metrics:

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|--|---------------|
| 1 Set Dates on Annual calendar of fundraising campaigns and events | May-16 |
| -Including Corporate sponsor campaign, individual donor campaign | |
| -Memorial concert sponsors, Fundraising events, and Donor recognition events | |

E. Strategy: Establish fundraising campaigns and financial goals

(Development and Hospitality Committee, CEO)

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|---|---------------|
| 1 Recruit corporate sponsors to total \$75,000 including season and Jazz Fest | Sep-15 |
| -Re-evaluate sponsorship offerings and benefits | Jan-16 |
| -Create overview document of sponsorship opportunities | Jan-16 |
| 2 Maintain individual donations to \$65,000 per year | Jun-16 |
| -Review Fouad challenge and develop new fund (Conductors Challenge) | Jan-16 |
| -Review individual donor benefits | May-16 |
| -Revamp donor recognition events | May-16 |
| 3 Increase ticket sales | May-16 |
| -Plan promotions for finalist season | |

- 4 Determine that the Jazz Fest and Finale (Spring Garden Party) are the two Signature fundraisers **May-16**
 - Determine date, location, concept **May-16**
 - Form event committees **May-16**
 - Plan Events **May-16**
- 5 Review donor engagement to increase effectiveness; i.e., receptions, calls, notes
 - Review Patron growth model **Mar-16**
 - Plan donor activities and make assignments **Aug-16**
- 6 Grow endowments to \$3 million **May-16**

2. Consistently produce symphonic programs of exceptional quality

A. Strategy: Recruit and Hire Music Director (Oct-2016 thru Sept-2017) *(CEO, Transition Committee)*

- 1 Provide support to transition committee
 - Research and develop music director contract for new hire
 - Review and update Music Director evaluation annually
 - Create succession plans for Music Director

B. Strategy: Recruit and retain talented musicians *(CEO, Internal Operations Committee, Music Director, staff)*

- 1 Continue to track musician retention and turnover
 - a. Utilize the previously developed exit interviews for musicians
 - b. Monitor pay of similar organizations in our region
- 2 Perform ongoing assessment of orchestra equipment/instruments
 - a. Update the priority needs list annually
- 3 Assess performance facilities in our region **Feb-16**
 - Determine need for additional facilities
 - Research calendar and usage policies as required

Metrics:

Utilize exit interviews that were structured for musicians.

Review musician pay annually

Instrument/equipment needs and priority list Jun-16

Assessment of performance facilities completed March, 2015

Create transition binder for Music Director succession

Create list of substitute conductors

3. Recruit and retain gifted staff, board members and volunteers

(Internal Operations Committee, CEO, staff)

Staff

- 1 Annual consideration of employee raises and/or bonus **Mar-16**
 - Review task mapping during employee annual reviews
 - Review short and long term succession plans for CEO
- 2 Conduct salary comparisons with League of American Orchestras data especially for CEO and Music Director
- 3 Budget, support and plan applicable training for staff development
- 4. Staff report to board on training attended & value added to organization

Board & Volunteers

- 4 Complete checklist of board skills to guide recruiting needs **Aug-16**
- 5 Develop menu of board responsibilities
- 6 Review board orientation and information training
- 7 Update volunteer recruiting

4. Attract and maintain an increasing and diverse audience base

(FSO Board, Marketing Director, CEO)

- 1 Institute recommendations from audience building consultants
 - Institute team approach to season planning for concert marketing **Apr-16**
 - Plan events or talks for each concert **Jun-16**
 - Plan house parties and restaurant/country club performances **Jul-16**
 - Include musicians in targeted audience building through receptions **Aug-16**
- 2 Institute advertising recommendations from consultants
 - Place ads in recommended sources **Sep-16**
 - Begin campaign with MWR ads **Sep-16**
 - Assess digital campaign with Liberty Point Media **May-16**
 - Survey new ticket buyers for source of information **May-16**
- 3 Attract new concert attendees through special offers or events **May-16**
 - Target new groups for promotions
 - Military offer or special receptions
- 4 Explore other locations to display concert information **Jul-16**
 - Special promotions with restaurants-advertising trade in program for table tents
 - Advertising trade for corporate sponsors-programs for business offices
 - Explore sponsor signs for businesses

5. Incorporate educational and outreach programs in all endeavors

(CEO and staff)

- 1 Expand summer camps for strings, brass and woodwinds **May-16**
 - Seek scholarship funding for demonstrated financial need
 - Provide strings mentoring in an expanded number of high schools
- 2 Expand the number of schools (30) served in 3rd grade program **Aug-16**
 - Identify schools for expansion with CC Schools
 - Identify funding sources for expansion i.e. Communities in Schools
- 3 Support FSYO concerts and activities **On Going**
 - Provide assistance with programs and volunteers
 - Identify and assist in fund raising opportunities
 - Provide leadership and experience with side by side concert
- 4 Provide three adult education outreach opportunities
 - Promote and assist FSYO parents groups
 - Identify venues, times and groups as speakers and resources for FSYO

Summary

The FSO strategic plan defines the direction and governs the decision making on allocating resources and revenues to pursue this strategy. Strategy generally involves setting goals, determining metrics to measure actions required to achieve the strategic goals. All the “Strategy’s” within this plan have a target completion date or require continuous review and update to achieve success.

Leadership is a critical driver in every organization. Prior to, and included in this strategic plan is the Music Director Search Committee that leads the search for a new Music Director. The search committee is actively engaged in a detailed search process.

CONCLUSIONS

The FSO 2016-2021 Strategic Plan was developed to provide guidance and direction to the organization in the fulfillment of its mission and goals. This strategic plan is designed to be a living document that is updated on a regular basis to reflect changes in priorities, opportunities, projects, and objectives that were not apparent when the plan was developed. Implementation of the plan will be monitored by the FSO Board of Directors and Executive Committee, with an updated version presented to the Board annually for approval.