



# **Salisbury Symphony Five-Year Strategic Plan 2019-2024**

**Adopted May 7, 2019**

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## **FORWARD**

The Salisbury Symphony, Inc. (the “Symphony”) is one of the oldest and most respected professional arts organizations in North Carolina. Started in 1966 as a collaboration between Livingstone College, Catawba College, and the Salisbury City Schools, the orchestra’s first concert was presented on November 6, 1967 in Keppel Auditorium of Catawba College; the Symphony incorporated as a non-profit North Carolina corporation in 1974.

During the past 52 years, we have grown into a nationally recognized regional orchestra employing 40 to 90 professional musicians per concert on a per service basis. Currently, the full orchestra performs seven concert programs per year. The Symphony also offers an inspiring music education program including in-school ensemble programs in elementary schools, a Family Concert featuring an All-County Fifth Grade Honors Chorus and high school soloists, an After-School Strings program, and a Youth Orchestras program. Educational programs produce over 28,000 student-teacher encounters annually.

The Symphony is governed by a Board of Directors of 24 elected volunteers. Artistic leadership is currently provided by Music Director David Hagy who has served for more than thirty years; the administrative team is currently led by William “Bill” Bucher, who became Executive Director in 2018. The Salisbury Symphony Guild provides additional volunteer support to the organization.

In comparison to other professional orchestras across the country, the Salisbury Symphony enjoys considerable support from the local community. The orchestra is recognized as an artistic leader in the community and is lauded for its high quality performances. We enjoy a loyal patron base, but also continue to expand our audiences and increase ticket sales. The organization has successfully balanced its budget for the past eight consecutive years, has a modest endowment, and continues to maintain a strong and growing annual fund campaign.

Despite these many successes, and like most orchestras across the country, we face a number of challenges including:

- ❖ Increased competition for the “entertainment” dollar and leisure time
- ❖ Increased competition for individual contributions and organizational sponsors
- ❖ Increased competition for talent
- ❖ The impact of inflation on wages, goods and services
- ❖ An aging core audience
- ❖ Perceived lack of relevance to younger and diverse audiences
- ❖ Changing community demographics, needs and preferences
- ❖ The impact of technology on the way music is delivered, received and enjoyed
- ❖ Reduction and/or elimination of music education in public and private elementary and secondary schools

Frequently, the impetus for change is motivated by some form of crisis. In order to remain vital and healthy, our leadership realizes that we must try to plan for and effect change rather than have to respond to crises later. Continued achievement of our vision and mission as an organization will depend upon a strategic plan that challenges our traditional boundaries of thought, reinforces a strong Board commitment to further build upon our artistic quality and creativity, encourages us to develop partnerships that better leverage the resources around us, and engages Rowan County and the surrounding communities in our success.

## **STATEMENT OF PURPOSE**

Through a multi-month planning process involving Board and staff members the Salisbury Symphony has developed this strategic plan to guide activities over the next five years towards a common set of priorities and goals that we believe will advance the organization in a way that is consistent with our vision, mission and values.

We strongly believe in the value and power of music to inspire community, build connections and serve as a catalyst for the growth and development of people in many ways. To that end, while our primary focus is musical performance, just as important is our desire to provide diverse educational experiences for children and adults that build and support the appreciation of music with all generations. Of course, we value fiscal integrity as well, so we strive to create a balance between our passion for reaching everyone in an innovative and thoughtful way and our stewardship of resources.

Our mission as an organization is stated as follows:

**“The Salisbury Symphony seeks to educate, entertain, inspire, engage and enrich our community through orchestral music and other musical performances of the highest quality.”**

In order to accomplish this mission, this plan establishes our strategic priorities and goals for the next five years. The priorities and goals relate to the following key issue areas:

- ❖ Audience development. Building long-term sustainable, and diverse patron relationships that cultivate interest and loyalty in the Rowan multi-county region
- ❖ Education. Providing educational and community engagement programs that bring the joy of music to our local and regional communities
- ❖ Financial strength. Ensuring the enduring financial growth of the organization, and providing funding support corresponding with the needs of the strategic plan
- ❖ Human capital. Attracting, engaging and retaining top talent in musicians, staff and volunteers so that we ensure and develop the full potential of the organization’s human resources
- ❖ Technology. Using technology to effectively enhance both the organization's administration and artistic programs
- ❖ Venues. Presenting programs to an expanded community in venues that provide the highest quality experiences for audiences and musicians

These key issue areas contain many goals that are not quantitative. While we value qualitative goals, we hope to find ways to evaluate our qualitative goals in a more quantitative or specific way. We hope to develop tactics that make the achievement of our qualitative goals measurable. With quantitative goals and methods of evaluating our qualitative goals, we will be able to effectively track our performance against this plan over time. Moreover, while all of our goals are important over the 5-year horizon of the plan, all of our goals are not equal. We intend to annually assess our priorities so that we are most effective in accomplishing our mission.

Key to the implementation of this plan is the re-engagement of the various members of our organization in a way that facilitates the achievement of the goals expressed by this plan. This has implications for our Board, our staff, our musicians and our artistic programming. We are committed to making the organizational and artistic changes required, and we plan to begin making those changes in the first year of the plan. Also key, however, is the prioritization of activity in a way that is both challenging and practical over the plan horizon. To that end, we plan to develop a timeline of achievement that is meant to be illustrative but not definitive. On an annual basis, we will evaluate and adjust our priorities to ensure the flexibility we need at an institutional level to effectively face obstacles and build upon successes toward the achievement of this plan.

Of course, we will not be able to accomplish this plan on our own, and we look forward to developing strategic partnerships with other organizations that find our vision and mission complementary to their own. In addition, when related to our mission, we plan to be strong advocates for Federal, State and local initiatives and programs that elevate, fund and otherwise support bringing the experience of music to the lives of all people.

<p><b><u>PRIORITIES/GOALS</u></b></p> <p><b>Understand audience needs and implement tactics to communicate with various audiences about who we are.</b></p>          <p><b>Grow both existing and new audiences.</b></p>          <p><b>Develop public pride in the Symphony organization.</b></p>          <p><b>Create enriching audience experiences both inside and outside the concert hall.</b></p>          <p><b>Promote the cultivation and engagement of advocates.</b></p>	<p><b>AUDIENCE DEVELOPMENT</b></p> <p><i>To build long-term, sustainable, and diverse patron relationships that cultivate interest and loyalty across the Rowan multi-county region.</i></p> <p><b>OBJECTIVES AND INITIATIVES</b></p> <p><i>Use personable market research techniques to better understand our community members' needs and desires.</i></p> <ul style="list-style-type: none"><li>• Carry out audience and community surveys with focuses on multi-generations and diverse community members (including generational and other preferences around programming, schedule, venue and other concert variations).</li><li>• Determine and analyze current and prospective audience demographics in order to inform decision-making on future efforts.</li><li>• Use diverse communication tools to reach different audiences and improve overall community awareness.</li></ul> <p><b><i>Prioritize and focus the development of our audiences.</i></b></p> <ul style="list-style-type: none"><li>• Create a fully developed marketing plan.</li><li>• Use sales tools, as well as public relations and education initiatives, geared towards target market segments.</li><li>• Develop programmatic offerings that satisfy the interests of existing audiences and reach new audiences.</li><li>• Enhance the visibility and profile of all orchestra musicians and all members of the artistic leadership team.</li></ul> <p><b><i>Advocate for the benefits of the orchestra to our community to develop public pride in the organization</i></b></p> <ul style="list-style-type: none"><li>• Present a positive view of the organization to the public</li><li>• Galvanize the public around the reasons behind the classic and other music we choose to perform</li></ul> <p><b><i>Examine the "product" (concert) and evaluate all aspects of it with an open mind</i></b></p> <ul style="list-style-type: none"><li>• Examine new ways of drawing audiences, both traditional and underserved audiences.</li><li>• Develop a variety of programming that satisfies existing audiences and attracts new audiences.</li><li>• Improve the entire experience of attending symphony concerts through amenities (e.g. snacks and drinks) and new approaches to services.</li><li>• Develop partnerships with organizations successfully serving the diverse audiences we seek to cultivate.</li><li>• Explore creative uses of technology to enhance the audience experience; where appropriate, use technology to make the in-hall concert experience more interactive and participatory.</li><li>• Improve the social aspects of attending concerts, to include fun and exciting pre-concert, intermission and post-concert experiences.</li><li>• Create opportunities for audiences to interact on our website, or by social media, with musicians and the Music Director.</li><li>• Develop music programs that can be enjoyed outside of the hall, throughout the community.</li></ul> <p><b><i>Update the tools and techniques we use to make concerts fun.</i></b></p> <ul style="list-style-type: none"><li>• Use social media in a way that engages audiences and enables them to support our marketing initiatives.</li><li>• Integrate educational and inspirational experiences with music programming.</li></ul>
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<p><b><u>PRIORITIES/GOALS</u></b></p> <p><b>Update and modernize accounting procedures to achieve greater transparency and accurate source data for strategic planning</b></p> <p><b>Steward and grow contributed and earned revenue.</b></p> <p><b>Create and implement an integrated development plan that includes annual giving, planned giving and endowment components.</b></p> <p><b>Develop quantitative goals against which progress can be measured and reported to the Board of Directors</b></p>	<p><b>FINANCE</b></p> <p><i>To ensure the enduring financial growth of the organization and provide funding support for the needs of the strategic plan.</i></p> <p><b>OBJECTIVES AND INITIATIVES</b></p> <p><b><i>Set new standards of recordkeeping and reporting.</i></b></p> <ul style="list-style-type: none"> <li>• Modify report design for greater accuracy and understanding.</li> <li>• Secure a new relationship with Accountant and Auditor.</li> <li>• Set standards for monthly financial reporting to the Board.</li> <li>• Maintain accounting records in easily auditable condition/format.</li> <li>• Prepare for future audits of financial position.</li> </ul> <p><b><i>Forecast revenue streams as basis for programming.</i></b></p> <ul style="list-style-type: none"> <li>• Conduct a feasibility study to inform the planning for revenue growth.</li> <li>• Develop concerts and other program offerings that have significant fundraising potential.</li> <li>• Proactively consider non-programmatic opportunities to earn revenue for the organization.</li> <li>• Develop offerings and partnerships that meet the evolving needs of local business and corporate partners.</li> <li>• Encourage a stronger sense of ownership among Board members, and a more fundraising-oriented board culture. Evaluate the needs of the board in the process of cultivating and selecting new board members.</li> <li>• Acknowledge donors and volunteers in meaningful and appropriate ways to reinforce our appreciation for their support.</li> </ul> <p><b><i>Prioritize balance in the development of longer-term fundraising initiatives.</i></b></p> <ul style="list-style-type: none"> <li>• Maintain a development focus on recurring income streams by promoting multi-year Annual Fund and other commitments from individual contributors and corporate sponsors.</li> <li>• Create a Legacy Society to recognize donors who remember the Symphony with a bequest. Effectively market Legacy Society opportunities with accountants, attorneys and others who influence our donor base.</li> <li>• Plan for a future endowment campaign. Retain professional support as needed.</li> <li>• Build staff and board capacity to focus on a multi-year, planned giving program while implementing other areas of the development plan.</li> </ul> <p><b><i>Build accountability for revenue.</i></b></p> <ul style="list-style-type: none"> <li>• Identify specific metrics to measure and evaluate progress towards our financial goals. Include quantitative goals for earned revenue, multi-year Annual Fund commitments, corporate sponsorships, grants, the endowment, and planned giving.</li> </ul>
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<u>PRIORITIES/GOALS</u>	<b>TECHNOLOGY</b>
<p><b>Ensure the effective use of currently employed technologies.</b></p>	<p>To use technology to effectively enhance administrative functions, concerts and other programs, as well as certain priorities in key issue areas of the strategic plan.</p>
<p><b>Maximize the use of technology in realizing the mission of the organization.</b></p>	<p><b>OBJECTIVES AND INITIATIVES</b>  <b>Improve current performance.</b></p> <ul style="list-style-type: none"> <li>• Train all staff and volunteers to effectively use current software on and off site.</li> <li>• Continue to improve all existing administrative hardware and software configurations to ensure that the staff is working with up-to-date equipment and software programs.</li> </ul>
<p><b>Make purchasing tickets and making contributions more convenient.</b></p>	<p><b>Enhance the use of technology in key issue areas of the strategic plan.</b></p> <ul style="list-style-type: none"> <li>• Utilize the website to create interactive experiences which draw people to performances.</li> <li>• Implement direct deposit for payments to staff and musicians.</li> </ul>
<p><b>Make the concert experience more fun.</b></p>	<p><b>Use technology to enhance the ticket purchase and donation processes.</b></p> <ul style="list-style-type: none"> <li>• Improve online ticket purchase and donation processes.</li> <li>• Develop automated systems/processes to sell tickets at offsite performance locations.</li> <li>• Expand e-ticketing capabilities, as both a tracking tool for audience participation and behavior, and to improve convenience for patrons.</li> <li>• Reduce time and effort necessary to check in guests prior to concerts.</li> </ul>
<p><b>Make it easier for musicians to rehearse and perform.</b></p>	<p><b>Use technology to enhance the audience experience inside and outside the hall.</b></p> <ul style="list-style-type: none"> <li>• Develop certain concert programming that uses technology as an integral part of the performance.</li> <li>• Find ways to use technology to enhance the listening and viewing concert experience.</li> <li>• Use technology to enhance written programs, program notes, preconcert education, etc.</li> <li>• Produce live streaming and web/podcasts of selected performances.</li> <li>• Provide opportunities for live video chats with musicians and the Music Director.</li> </ul> <p><b>Use technology to enhance the performer’s efficiency and experience.</b></p> <ul style="list-style-type: none"> <li>• Research technology which would allow us to enhance communication with musicians and enhance record keeping with regard to musician pay, mileage reimbursements and performance details.</li> </ul>

<p><b><u>PRIORITIES/GOALS</u></b></p> <p><b>Ensure that each of the performance facilities used by the SSO meet the needs of the organization.</b></p> <p><b>Define a vision for the future. Develop a thoughtful plan for using present facilities and developing future facilities.</b></p> <p><b>Identify ways to more fully utilize the features of performance venues to enhance performance experiences for musicians and audiences.</b></p> <p><b>Use alternative venues as a way to take performances to the community and to increase the SSO's sphere of influence.</b></p>	<p><b>VENUE</b></p> <p>To present programs in venues that provide the highest quality experiences (acoustics, physical space/comfort, technology, social interaction) for audiences and musicians.</p> <p><b>OBJECTIVES AND INITIATIVES</b></p> <ul style="list-style-type: none"> <li>• Ascertain that each of the venues used is suitable for the programs presented and will continue to meet the requirements of the organization.</li>   <li>• Define the organization's goals and criteria for the "ideal" performance venue, for all types of performances.</li> <li>• Identify possible alternative venues and identify possible partners to assist with planning programs for those venues.</li> <li>• Inform and educate community leaders for the need for a significantly large "dinner theatre" type venue.</li>   <li>• Assess customer expectations around concert venues, including parking, concessions, ticketing, front-of-house, the performance, and access to pre- and post-concert attractions and activities.</li> <li>• Assess musician experiences of the rehearsal and concert venues to determine strengths and weaknesses of various alternatives.</li> <li>• Identify potential areas of improvement in each of the current venues. Work with venue hosts to design and implement improvements to enhance the use of performance facilities.</li>   <li>• Actively seek opportunities to perform in large or small groups away from our usual venues.</li> <li>• Develop partnerships with other organizations that have performance facilities, both traditional and non-traditional, for not only the use of these venues but for collaborative performances.</li> <li>• Develop programming that is versatile and can be used in a variety of performance venues and settings.</li> </ul>
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