Creativity, Engagement, Impact:
Strategic Plan, 2016-2020

Abridged
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STRATEGIC PLAN

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Cover image: The exterior of the New World Center, home of the Miami Beach-based New World Symphony, showing a live Wallcast of a concert in the hall. Photo by Rui Dias-Aidos.
Preface

The League of American Orchestras began in 1942 as a communications network for civic orchestras. The organization, then called the American Symphony Orchestra League, was formed by a group of 23 representatives of semi-professional and community orchestras; while major orchestras had an informal organization that pre-dated the League, no network yet existed among civic and smaller orchestras. By 1954, just over a decade later, the League became the one national organization serving all orchestras and was chartered by an act of Congress in 1962.

Today, the League serves hundreds of member orchestras, including major professional orchestras and hundreds of smaller part-time, semi-professional, community, college, and independent youth orchestras. In total more than a quarter of a million professionals, volunteers, musicians, and administrators are served by the League, who in turn bring symphonic music to more than 26 million audience members annually.

The League completed its last planning process in 2006. The resulting strategic direction, “Supporting Orchestras in a New Era,” guided the League through what would soon emerge as a large-scale global economic recession. This recession seriously challenged the League and its members, amplifying the already challenging existing pressures in the field. The League emerged intact from the economic crisis and even completed its $25 million comprehensive campaign that supported the new strategic direction. However, the League found itself, as did nearly every arts organization after the recession, with a tightened budget, reduced capacity, and diminished infrastructure.
Despite these constraints, the League had a direct and positive impact on the orchestral field. The League helped orchestras understand and confront the realities of changing audience preferences; sharpen their skills in partnering with their communities; address increasing demands to create and communicate public value; look outward to consider a wide array of strategic options; and to value learning and innovation. With the League as a catalyst, convener, and source of information and knowledge, orchestras have become keenly aware of the profound changes in their environment and are increasingly engaged in tackling threats and seizing opportunities.

In order to ensure the League’s continued success and to create a vision that will guide it in the coming years, Board and management decided now is an appropriate time to take stock and reflect on the organization’s strategic goals. This plan is the result of a process undertaken by a Strategic Planning Task Force of the Board chaired by Director Steve Parrish, along with vice-chairs Jim Hasler, Anne Parsons, Henry Peyrebrune, and Patricia Richards, League Board Chair. Members of the Strategic Planning Task Force are listed at Appendix G.

The process, facilitated by AEA Consulting, involved research, including a survey of all the League’s members (summarized at Appendix E); consultation with dozens of members of the League community (listed at Appendix F); a series of working-group meetings in which key issues and strategic priorities were discussed and agreed upon; and work with staff on detailing the financial and organizational implications of the Plan.

*Essential support for the planning process was provided by Connie Steensma & Rick Prins, Steve Parrish, Pat Richards, David Roth, Alan McIntyre, and Jesse Rosen, whose generosity and commitment to the League’s success are deeply appreciated.*
President’s Introduction

This plan was developed in a moment of great possibility. It builds on the momentum generated by orchestras and the League following the last strategic plan. Today, orchestras are embracing the opportunities presented by the current environment with vigor and ingenuity. The rate of experimentation is at an all-time high. As audiences, current and prospective, reveal increasingly new and varied preferences, the experience of orchestral music, its very nature and access to it, is evolving rapidly.

Parallel to these changes, orchestra missions are also in play, shifting from an inward focus, on their own attributes, to an outward one: the public impact they make. The old tensions between “protect and preserve” versus “embrace the future” are giving way to a more holistic view that fuses excellence and engagement, that defines purpose as both fostering creativity and creating community value, and that understands repertoire as a continuum of new and old, and as a moving point on a spectrum of genres.

With nearly 1,400 orchestras across the country, America is brimming with extraordinary musicians, live concerts, and orchestras as unique as the communities they serve. Orchestral music and the ensembles that bring it to life at ever increasing standards of virtuosity and quality, continue to demonstrate resilience and to hold a firm position among Americans’ most treasured genres.

For many orchestras, the current period of economic recovery is providing the fuel for change. But the Great Recession, still fresh in our memories, has
left some important lessons: the frailty of both capital structures and organizational cultures inhibits effective response to inevitable downturns. We have also been witnessing the ripening of the public value challenge. As the Federal government continues to seek new revenues, nonprofits of all kinds have been challenged to defend tax incentives for charitable giving. State legislatures are similarly considering curtailing deductions for charitable gifts, reviving taxes on ticket sales and instituting, for orchestras and other nonprofits, payments in lieu of taxes. The debate centers around public benefit: what is the value to the public that merits our tax-exempt status? Income streams are further threatened by changes in philanthropic priorities as wealth is transferred to many next-generation philanthropists for whom classical music commands less interest. And as America races toward a majority minority population, orchestras, despite decades of local and national efforts, are still a long way from reflecting the composition of the communities they serve.

Meanwhile, as digital natives reach maturity, the idea that live performance has some innate superiority is no longer taken for granted. At the same time, the appetite for classical music endures, evidenced by recent data revealing that, other than a broad category encompassing “popular music,” classical music was the musical genre most watched or listened to on TV, radio, or the Internet. The long-form live symphonic performance has to find a place alongside the digitally-enhanced, multi-layered, and often short experience that is the norm.

The demands on staff, board, musicians, and volunteer leaders to navigate change have never been greater. As is the case across the entire nonprofit sector, the leadership pipeline for orchestras is insufficient in both supply and preparedness to lead and thrive in this environment.

These conditions have triggered fresh thinking about the new work of orchestras, their practices and priorities, and the knowledge, skills, and talent they will need to meet these challenges. As orchestras now pivot and ask “how to change,” rather than “should we change,” the need for the League’s leadership and partnership is greater than ever.
How, then, must the League of American Orchestras focus its work in the years ahead?

Looking from 30,000 feet at the evolution taking place, we observe that orchestras are adding to their transactional role – i.e., the production of high-quality concerts – a relational role. In their relational roles, orchestras continue to strive for excellence in performance, but now bring equal attention to the nature of the orchestral experience itself: the interplay with different audiences; synergistic and authentic engagement with communities; expanding roles of musicians, composers, and conductors as ambassadors, advocates, and educators; and increasing activity in lifelong learning and civic participation.

The League then needs to support orchestras in realizing more fully their role in this period of broad social, demographic, and technological change. It must embrace its role both in supporting orchestras and in promoting public understanding of their role in civic and community life. It must lead its members in collectively advancing, articulating, and advocating for the essential experience that only orchestras can provide.

To capture the dynamic role of orchestras in this environment, the League has developed a refreshed mission:

To advance the experience of orchestral music, support the people and organizations that create it, and champion the contributions they make to the health and vibrancy of communities.

What must the League of American Orchestras do now to realize this mission?

The League must fuel the work already underway in orchestras to adapt to the current environment. It must help orchestras develop their capacity to become increasingly relevant to their communities. New practices in engagement are being tested, and the League must help to capture the
experience and lessons and ensure that local successes yield field-wide impact. And as orchestras take on increasingly central civic roles, the League must tell this new story to policymakers and other key stakeholders so that public perception matches the progress orchestras are making in their communities.

To embrace the scope of the talent-development challenge, the League will have to scale up this work, bringing new partners to the table and promoting best practices among our member orchestras. Diversity, and in particular the place of race and ethnicity, is an urgent national issue, and the League must seize its role to focus attention and help orchestras find pathways, individually and collectively, to take action. Diversity is just one of a number of difficult conversations for orchestras; the League must create the space for candid dialogue with many stakeholders around the table about the tough issues ahead.

Now is the time for orchestras to do the essential work of building healthier cultures and stable finances, not when the next economic downturn occurs, and the League must help with the necessary tools and practices. And even more fundamental, governance practice will have to improve so that orchestras can advance institutionally; the League’s Noteboom Governance Center will have to rise to this challenge.

*What is required of the League to do this work?*

Nothing short of organizational reinvention. Just like its members, the League must confront the external changes impacting its work. Digital technology has transformed the ways people associate, access information, generate knowledge, and learn. The demand for instant, easily accessible, and customizable information grows exponentially. And no association in this exploding information age can continue to claim an exclusive on the relevant information. As *Independent Sector* writes in its “Nine Key Trends Affecting the Charitable Sector,”
Technology innovation will continue to require organizations to adopt a stance of continuous learning and experimentation, as new tools change the way that individual teams and society itself can organize... As our communication tools evolve into ever more powerful forms, it will be even harder to win a person’s attention but easier to sustain relationships in spite of distance and infrequent in-person contact. As the experience of online engagement becomes increasingly close to that of face-to-face meeting...learning will be fast, as-needed, and frequently in groups. Gathering in person will increasingly occur only when in-person connection is critically important. And, the role of an association will increasingly shift from a one-size-fits-all approach to something more customized, providing a lightweight structure for fostering a variety of peer-to-peer connections and enabling participatory leadership.

To embrace its role as a primary source of accessible knowledge and information in this new age, the League will have to invest heavily in its technology and knowledge-management capacity. To fulfill the opportunities to help members connect in the groups they create and to access the information members need, the League needs up-to-date digital platforms for peer communication and digital learning. And it will require the human resources to develop and implement this work. In short, the League must prioritize its commitment to 21st-century technology as a core programmatic commitment.

The many changes impacting associations require the League to test and hone its value proposition with members continually. To meet this need, the League must devote more human and technology resources to serve its members, understanding and responding to needs and forecasting opportunities. New positions for a chief technology officer and a fully dedicated member engagement director are called for in the plan. This repositioning of the League will require investment in staff development to ensure alignment, learning of new competencies, and professional development, modeling best practice in human resources management.
The League too must plan for its long-term future and seek protection from uncertainties ahead. Now is the time to build on its strong balance sheet and stable operating funds and grow its reserves, risk capital, and annual funds. And it must address the risks of rapidly accelerating occupancy costs in its current Manhattan headquarters. We are exploring the option of purchasing space in New York City to mitigate escalating rent expenses, sustain our management team, and build out necessary distance learning and conferencing capabilities. These and structural improvements in the League’s capitalization are essential to long-term delivery on mission.

While the challenges ahead can seem daunting, the collective power of orchestras working together is great. The League is uniquely positioned to help support, focus, and advocate for the new work that is bringing the experience of orchestral music increasingly into the stream of American life. In the pages that follow, we describe more fully the strategies we believe will help the League and our members realize the many opportunities ahead.

Jesse Rosen
President & CEO
Executive Summary

To capture the dynamic role of orchestras in this environment, the League has developed a refreshed mission and vision:

Mission
To advance the experience of orchestral music, support the people and organizations that create it, and champion the contributions they make to the health and vibrancy of communities.

Vision
The orchestral experience is shared by all and supported by artistically vibrant, robust, and civically engaged organizations; and
The League is an indispensable leader, resource, and voice for the orchestra community and its value to the public.

To support and lead the work of orchestras in this exciting time, the League will focus on five strategic priorities in the next five years.

Priority One: Advance the Orchestral Experience

*Increase orchestras’ capacity to be relevant and responsive to the civic and artistic needs of their diverse communities by:*

- Fostering the development and adoption of new community engagement practices
- Identifying new pathways for orchestras to be more diverse and to serve audiences that are more reflective and inclusive of their communities
- Gathering and disseminating stories and practices that reflect the breadth, scope, and impact of orchestral experiences in America, including more numerous and less-publicized of those experiences by communicating the impact of youth, small-budget, and adventurous emerging orchestras
- Supporting the creation of orchestral music and performance at the highest level of inspiration and quality, assisting orchestras in connecting with their communities, and convening stakeholders to explore the current landscape of civic and artistic challenges
• Representing the orchestra field in public policy, government relations, media relations, and national and global cultural and civic conversations, implementing strategies that no single orchestra can achieve on its own

Priority Two: Develop the Field

Help orchestras develop inspiring and effective leadership, healthy cultures, and robust and sustainable business models by:

• Expanding and improving digital learning experiences that reach more members
• Promoting and communicating the elements and practices of good governance in the orchestra community
• Building partnerships with national associations devoted to identifying African-American and Hispanic talent
• Collecting and sharing best practice on organizational culture, drawing from the broader literature and expertise available in outside fields
• Building on the League’s long-standing role in supporting artistic excellence by helping identify emerging conducting and compositional talent, developing ways to help orchestras meet the opportunities for artistic growth and advancement in the current environment.

Priority Three: Better Serve Members

Become a stewardship-focused and knowledge-driven organization by:

• Improving and integrating the League’s relationship-management infrastructure
• Helping members connect according to affinity, topic, and geography for programs and communications, while maintaining activities focused on budget size where appropriate and relevant
• Fully dedicating a staff person to member stewardship and engagement
Priority Four: Strengthen the League’s Business Model

*Build the capital structure and revenue base to support the League’s mission delivery by:*  
- Developing and implementing earned income generating strategies, based on analysis of trends and testing of new opportunities such as a broad-based individual membership program,
- Developing a National Advisory Council with the goals of providing visibility and anchoring fundraising in target markets
- Strengthening the League’s approach to fundraising and sales in target markets through strategic presence, timing, activities, and content that cultivates a national donor base
- Growing operating reserves and increasing the risk capital fund

Priority Five: Grow the League’s Capacity

*Develop staff structures, expertise, organizational culture, and technology to ensure excellence in management and operations by:*  
- Developing and implementing an Information Services and Technology Plan that includes necessary personnel, effective maintenance, periodic evaluation and upgrades to essential systems
- Forging strategic partnerships with national arts databases to access the most robust data and to facilitate efficient collection and analysis
- Identifying and understanding gaps in human resource needs, and securing access to professional human resource support
- Investing in personnel for departments that require additional capacity to execute the strategic plan, including the creation of a Chief Technology / Information Officer position
- Revamping the League’s online platforms to design systems and resources that connect League members and external stakeholders with the knowledge, information, products, and services they need
Desired Plan Outcomes
Desired Plan Outcomes

A list of top-level desired outcomes for the plan is given below, organized by priority area.

1: Increase orchestras’ capacity to be relevant and responsive to the civic and artistic needs of their diverse communities
   - Programming serves the diverse artistic and civic needs of orchestras’ multiple audiences
   - Artistic vibrancy grows as new work, new presentation of old work, and new artistic partnerships evolve
   - More diversity across all orchestra constituents
   - Public perception of orchestras changes to reflect the artistic vibrancy, innovation and community citizenship that now typify the field.

2: Help orchestras develop inspiring and effective leadership, healthy cultures, and robust and sustainable business models
   - Increased collaboration within and among orchestras, fewer disputes.
   - Improved staff retention
   - Increased number of qualified candidates for executive openings
   - Orchestras are appropriately capitalized, and revenue meets expenses over time
   - Additional investment of resources for talent development
   - Improved Board performance as best practices in governance are widely adopted

Preceeding image: Students from the Dallas Symphony Orchestra’s Young Strings program. Photo courtesy of Dallas Symphony Orchestra Young Strings.
3: **Become a stewardship-focused and knowledge-driven organization**

- Member generated peer networks emerge supported through League platforms
- Member satisfaction improves
- Members utilize more League resources with increased frequency
- Member retention improves
- Membership increases
- All members regard the League as their indispensable partner and trusted voice

4: **Build the capital structure and revenue base to support the League’s vision, mission, and strategic priorities**

- Growth in earned income from dues, registrations, and other activity
- Number of major donors increases
- Annual fund grows and achieves a sustainable level to meet growth in operating expense
- Occupancy costs stabilize

5: **Develop staff structures, expertise, organizational culture, and technology to ensure excellence in management and operations**

- Quality, accessibility, and timeliness of data improves, resulting in deeper learning, better service to members and improved staff efficiency
- Staff retention and satisfaction improves
- Greater understanding and transparency of program impact
- Staff is galvanized around the League’s mission; enthusiastic about its work, and makes meaningful contributions toward achieving the League’s vision
Strategic Planning Task Force

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