

The Virtual Office

A strategy of The Symphony Guild of Charlotte, Inc.

Charlotte Symphony
301 S. Tryon Street
Charlotte NC 28202

Orchestra Size: Group 2

MSA Population: 2,335,000

Presenter:

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Project Overview: We had been in our Guild office for 18 years. File cabinets were full of old paperwork. Shelves were bursting with memorabilia. Our storage unit was full of junk. Our office administrator only worked two days per week, four hours per day, and only on occasion did members use the office for committee meetings. While we had a GREAT deal from the building's management, we had major concerns about not fully utilizing our office, and the monthly utility bills were eating into our ability to focus funds on our mission. NOTE: planning and execution required two years.

Project Goals: We wanted to 1) reduce expenses, 2) operate efficiently and 3) create zero net-impact on members.

Project Description:

- met with non-profit consultant (Guild member) who presented three options
 - share office space, keep existing office and jettison storage space , OR establish virtual office and downsize storage
 - with no viable shared spaces, we presented to our Board and chose to go virtual
- clean-up plan
 - storage unit first
 - * assessed, inventoried, rearranged for ease of access
 - * held Saturday Scavenger Hunt for members to take home unneeded inventory and donated the balance to other non-profits
 - historical documents
 - * 31 Guild scrapbooks dating to 1966 were archived at University of North Carolina-Charlotte Special Collections
 - * document retention schedule committee carefully recorded all documents and made decisions on what to keep and what to destroy
 - extra office supplies donated to local school
 - telephone landline and internet services discontinued
- office administrator
 - works from home, with own internet and printer, checks email/voicemail once per day
 - set up office with donated laptop, TechSoup software, cell phone with old office number, and downsized office supplies
 - PO box for incoming mail, also for exchange of documents (virtual inbox) for treasurer

- indexed resource documents for Guild members placed online
 - used annual retreat to educate all leadership and membership on location and usage

Financials:

ANNUAL COST	Rent	PO Box	Storage	Copies	Phone	Internet	TOTAL
Prior	\$4200	0	\$1500	\$425	\$1008	\$960	\$8093
Virtual	0	\$276	\$480	\$200	\$144	0	\$1100
NET ANNUAL SAVINGS	\$4200	(\$276)	\$1020	\$225	\$864	\$960	<u>\$6993</u>

One-time expenses—\$317: moving storage, cell phone purchase, and activation
 In-kind—\$350: laptop/case, TechSoup software

Volunteers: President, VP-Management & Planning, Office Administrator, 3 members

- Year One—350 hours:
 - planning, Scavenger Hunt, office cleanout, moving storage
 - hired new office administrator
- Year Two—40 hours:
 - coordinated new operating plan, inventoried new storage, created virtual notebooks, planned training retreat

Successes:

- reduce costs
 - \$7000 annual savings; Guild membership dues completely cover administrative costs—all funds raised now support mission
- operate efficiently
 - office administrator works flexible hours; supplies inventory online and updated; mail managed in timely manner; document retention schedule reviewed annually—all items are retained/destroyed appropriately; members’ dining rooms are our new conference room
- zero net impact on members
 - kept phone number and email address; virtual notebooks and storage inventory on website for easy access

Suggestions:

- seek advice from other non-profits/consultants to determine how to optimize functionality
- take advantage of technology and cloud-based processing
- hire dynamic office administrator who can function in hi-tech environment
- engage detail-oriented, organized members to plan and implement

Submitted by:

Lisa Phillips
 President 2011-2013

