

**2023 League Volunteer Council
Strategic Conversation #3 October 4, 2023 at 3pm Central**

Facilitators: Laurie Skjerseth, Volunteer Council President, Florence McLean, Secretary
Paula McReynolds, Volunteer Council and Melanie Hausmann, League Liaison
Moderators: Janet Cabot, Loretta Davenport, Kathy Leibrand, Maggie Stehman

Attendees: Betty Fox, Asheville Symphony; Barbara Sturges & Karen Hoag, Illinois Philharmonic; Carol Blum, Kellie Sullivan, Uta Cross, Kansas City Symphony Orchestra; Sara Cerato, and Richelle Rabenour Philadelphia Orchestra; Judy Kalan, Madison Symphony Orchestra; Julie Brantley, Richmond Symphony; Michael Kikta, Rockford Symphony Orchestra; Liz Arend, Waco Symphony; Debbie Monark, Williamsburg Symphony Orchestra; Martha Kroese, Waterloo-Cedar Falls Symphony Orchestra, Gail Corvette, Charleston Symphony League

Laurie welcomed everyone to Strategic Conversations! And introduced Paula McReynolds. Today we are keeping with our theme of this series to discuss how to begin preparing a Strategic Plan for your guild. We have a lot to cover so Let's get started.

Paula shared some documents that you will be able to take away after this meeting to use as part of your strategic planning process. They include Getting Started on a Strategic Plan, Questions on Strategic Planning (some of which we will ask today) and a Basic Strategic Plan Outline.

Paula presented a Powerpoint on what you need to get started on a strategic plan.

- **Assemble at Team**
Form a diverse group of individuals with different skills, experiences, and perspectives. Include board members, volunteers, and key stakeholders within the symphony guild.
- **Define or Review your Mission, Vision, and Core Values**
Clearly articulate the purpose of your guild (mission) and what you aspire to achieve in the long term (vision). Make sure that your Mission, Vision, and Core Values are up to date and address the current state of the guild/orchestra. These statements will guide your strategic planning efforts.
- **Conduct a Stakeholder Analysis**
Stakeholder analysis is a crucial component of strategic planning. Identifying and understanding the needs, interests, and influence of various stakeholders helps the Guild develop strategies that align with their goals and foster positive relationships with those

involved. Examples of stakeholders can include musicians, volunteers, donors, vendors, local businesses, and the community.

- **Conduct a SWOTA Analysis**
Assess the guild's strengths, weaknesses, opportunities, threats, and achievements (SWOTA analysis). This evaluation should be based on data and input from members and stakeholders.
- **Set Clear Objectives**
Establish specific, measurable, achievable, relevant, time-bound, and equitable (SMARTER) objectives that align with your mission and vision. These objectives should address key areas like fundraising, membership growth, community engagement, and more.
- **Develop Strategies and Prioritize Initiatives**
Identify strategies that will help you achieve your objectives. These could include initiatives related to fundraising, marketing, member recruitment, education, and community outreach.
- **Create an Action Plan**
Develop a detailed action plan for each prioritized initiative. This plan should include timelines, responsible individuals or teams, and resource allocation.
- **Budgeting**
Estimate the financial resources needed to execute your action plan. Create a budget that accounts for fundraising targets, operational costs, and other expenses.
- **Measure and Monitor Progress**
Establish key performance indicators (KPIs) and a system for tracking progress. Regularly review and update the plan as necessary to ensure you're staying on track.
- **Risk Management and Assessment**
Assess and Evaluate risks within the strategic planning process. Identify potential risks and challenges to develop contingency plans to mitigating risks.
- **Engage Stakeholders and Communicate the Plan**
Keep your guild members, volunteers, and other stakeholders informed and engaged throughout the planning process. Their input and support are crucial.
- **Implement and Evaluate**
Begin implementing your initiatives according to the action plan. Continuously evaluate progress and adjust as needed to achieve your objectives.
- **Celebrate Achievements**
Recognize and celebrate milestones and achievements along the way to maintain motivation and morale within your guild.
- **Review and Revise**
Assess and Evaluate risks within the strategic planning process. Identify potential risks and challenges to develop contingency plans to mitigating risks.
Periodically review the strategic plan (e.g., annually) to ensure it remains relevant and effective. Make updates and revisions as needed based on changing circumstances or goals.
Writing a plan and then putting it to the side will not advance your organization and will minimize the opportunity for your guild to evolve, grow and thrive.
- **Strategic planning is an ongoing process, not a one-time task.**
It requires commitment, flexibility, and adaptability to respond to changing conditions and opportunities. By following these steps, your symphony guild can develop a clear roadmap for success and make a lasting impact on the community it serves.

Strategic Planning Poll was taken.

Do you currently have a strategic plan in place for your guild?

25% replied Yes

75% replied No

What is the biggest benefit of having a well-defined strategic plan for a symphony guild?

- A. It helps a guild successfully negotiate its future.
- B. It allows for a guild to achieve its goals.
- C. A strategic plan allows a guild to review and revise its mission to keep up with current trends.
- D. It allows the guild to enrich and educate the community through music.
- E. 100% said All of the above.

What obstacles or resistance have you encountered when trying to implement strategic plans in the past?

- A. 13% The symphony association doesn't think the guild needs a strategic plan.
- B. 13% The guild thinks it's a waste of time.
- C. 31% We don't have a strategic plan. That's why we are here today.
- D. 56% Other reasons.

Breakout session

Next, we were divided into 5 breakout rooms where the volunteers were asked to prepare a section of a strategic plan that involves your guild putting on a children's concert for the public schools at your local symphony hall.

Group 1 addressed Assembling a team, Group 2 addressed Setting Clear Objectives, Group 3 addressed Developing Strategies and Setting Priorities, Group 4 addressed Engaging Stakeholders and Communicating the Plan, and group 5 addressed Risk Assessment and Management.

Thanks to the moderators for the breakout rooms were Maggie Stehman, Loretta Davenport, Janet Cabot, Kathy Leibrand, and Laurie Skjerseth.

The moderator greeted everyone in their breakout room. They kept time and clarified any questions the group may have about the exercise. Towards the end of the 20 minutes a selected person was ready to report out with one or two ideas that they liked from their discussion.

When everyone returned from the breakout rooms Paula asked each group to report on their ideas. Paula then summarized the information given and thanked everyone for their discussion and results.

Group 1: spoke on coordinating with the orchestra staff, schools, and music teachers

Group 2: asked who the audience is and how many will be attending. The venue comes first in planning. Are the tools measurable and what are they doing it: to introduce classical music. Look at past history -do the schools return year after year? Set goals. Keep in mind the visual or auditory learners. Waco has been putting on a children's concert for over 70 years.

Group 3: Objective was to introduce kids to classical music. Keep your goal: what is it? And get the volunteers.

Group 4: Does it connect with the diversity of students? Engage with local businesses and understand the complete impact. Create a fact sheet.

Group 5: discussed budget, timing, notification, know exactly who's coming (any children with disabilities), scheduling a concert. Develop a mascot (like the Pittsburgh symphony). Students give it a name

Mostly spoke about the bus situation. Most schools have to pay for their own transportation to these concerts. In Iowa the Iowa Arts has a special program called the "The Yellow school bus" to help with funding. Some what ifs were brought up: if a bus was late and seated in the front, what happens when a bus breaks down, bad weather. Most were met on the bus and escorted to the auditorium and also released in a mannerly order when the concert was finished.

It was voted favorable when Paula asked if it would be good idea gather again to discuss this subject in March. Paula will also emailing all participants Stakeholders Analysis for Strategic Planning and Questions for Strategic Planning.

A special thank you was given to Paula McReynolds as she presented a session on Strategic Planning. Next week, Gail Corvette, from Charleston Symphony League will present "Ladders to Leaders". Mary Lou Turner, a Sustainer Chair of Mentoring Program, from Kansas City will discuss Mentoring. And the 4th session will conclude with an overview of the 79th League of American Orchestras Annual Conference to held in Houston and hosted by the Houston Symphony Orchestra.