

A background image of a musical score with multiple staves and notes, rendered in a dark, slightly blurred style. The text "Santa Barbara Symphony" is overlaid in a white, elegant serif font.

Santa Barbara Symphony

Strategic Plan

September 2004

Overview

This presentation outlines objectives and strategies for the Santa Barbara Symphony for 2004-2009.

Our overarching goals are:

- Artistic Excellence (performers, programs, venues, relevance)
- Audience Growth (acquisition, retention)
- Financial Stability (planned growth and balanced budgets)
- Community Contribution (engagement)

Symphonies face great challenges today. A thorough understanding of our mission and objectives, and a creative but realistic approach to our challenges will ensure that the Santa Barbara Symphony continues to grow and thrive.



Our Mission

“To be a highly respected symphony orchestra, performing great works with passion and excellence. To be an indispensable partner to our community, providing enrichment through inspiring concerts, music education programs and access for all.”



Our Situation Today – A Symphony in Transition

Like many symphonies today, the Santa Barbara Symphony is feeling financial pressure driven by:

- Increased competition (CAMA, MAW, UCSB)
- Declining subscription sales
- An aging audience
- Reduction and/or elimination of classical music education in schools

Additionally, the Santa Barbara Symphony is facing several key transitions, including:

- The search for a new music director
- The transition to a new concert hall

Out of these changes, we expect to emerge stronger.

Success will depend upon a sound strategic plan, a strong and committed board, and a clear sense of purpose.



Four Key Cornerstones of Success



Setting S.M.A.R.T. Goals

In order to ensure success, we must be certain that our goals are:

Specific

Measurable

Actionable

Realistic

Time-bound



Cornerstone I: Artistic Excellence

Objective: To offer passionate and excellent musical performances in dynamic and vital presentations that engage and inspire

Goals:

- Find a Music Director whose compelling artistic vision will:
 - Provide excellent leadership for the orchestra
 - Grow our audience and subscription base
 - Lead our community engagement and development efforts
- Offer programs in superior venues, including transitioning to a new concert hall
- Offer relevant and inspiring programs with guest musicians and conductors of the highest possible caliber
- Invest in creating and maintaining the best orchestra between Los Angeles and San Francisco



Cornerstone I: Artistic Excellence

Goal 1: Find and establish a new Music Director

Strategies:

- Complete the current Music Director search
- Market the new MD locally and regionally
- Increase the appeal of the position through creatively expanding opportunities for performances and exposure
- Maintain ongoing relationship with possible future candidates



Cornerstone I: Artistic Excellence

Goal 2: Offer programs in superior venues, including a new concert hall that offers excellent acoustics, superior comfort, and architectural distinction

Strategies:

- Move the SBS to the Granada Theater as primary tenant, beginning with the 2006-07 concert season
- Explore additional exciting or inspirational venues for SBS concerts



Cornerstone I: Artistic Excellence

Goal 3: To offer relevant and inspiring programs that build an enthusiastic and knowledgeable audience. Engage guest musicians and conductors of the highest possible caliber

Strategies:

- Conduct research to learn what programs and artists will be most appealing to our target audiences
- Commit to booking world-class artists
- Seek emerging guest artists of the highest artistic quality
- Introduce guest conductors on a regular basis (at least one per season)
- Explore adding new programs (Pops, Light Classical, etc.) to expand our relevance and appeal



Cornerstone I: Artistic Excellence

Goal 4: Invest in creating and maintaining the best orchestra between Los Angeles and San Francisco

Strategies

- Strengthen the orchestra by focusing on the development of specific sections and by teaching a variety of performance styles
- Actively recruit the best possible players to fill SBS vacancies
- Improve overall orchestra operations and information dissemination
- Increase musician loyalty to the SBS by offering inspiring artistic direction and a fitting infrastructure for a fine orchestra
- Research and seek out best contemporary composers and champion their works



Cornerstone II: Audience Growth

Objective: To cultivate sustaining interest in and support of the Santa Barbara Symphony in the local community. To grow concert attendance and subscription base. To broaden our demographic appeal and attract new members to our audience.

Goals:

- Improve the overall marketing of the SBS by making it more targeted, relevant, and measurable
- Build the overall SBS brand through increased recognition and awareness
- Grow the overall audience
- Grow overall subscription sales
- Grow, train, and empower the Symphony League



Cornerstone II: Audience Growth

Goal 1: Improve the overall marketing of the SBS

Strategies:

- Create metrics for measuring marketing effectiveness and let them dictate how we spend our dollars
- Create specific marketing objectives and measure ourselves against them
- Conduct research into the effectiveness of our current marketing
- Research whether we should be promoting soloists, composers, or themes, and be consistent in doing so
- Conduct a usability study of the current website and ensure its usability and effectiveness
- Evaluate new marketing methods (Internet, direct mail, etc)
- Capitalize on tourist traffic, targeting particularly the LA market



Cornerstone II: Audience Growth

Goal 2: Build the overall SBS brand recognition and awareness

Strategies:

- Seek out and participate in activities that will garner public exposure and recognition
- Create strategic partnerships with local organizations to promote the SBS
- Initiate a public relations campaign to increase public visibility of the SBS



Cornerstone II: Audience Growth

Goal 3: Grow the overall audience

Strategies:

- Understand our current demographic and target specific “stretch demographics”
- Develop programs to expand our audience (Pops, Family, NUVO, etc)
- Create specific incentives for existing patrons to introduce friends and family to the SBS
- Establish specific volunteer chairs or committees to attract specific new demographics (under 35, newcomers, students, etc)



Cornerstone II: Audience Growth

Goal 4: Grow overall subscription sales

Strategies:

- Set and meet specific goals for new, non-renewal, subscription sales
- Develop packages to up-sell single ticket purchasers into package purchasers
- Focus on conversion, not awareness marketing, and measure its effectiveness on a monthly basis



Cornerstone II: Audience Growth

Goal 5: Grow, train, and empower the Symphony League

Strategies:

- Create and adhere to an active recruitment plan to grow the SBS League
- Institute specific programs to train members to be active salespeople and spokespeople for the SBS
- Integrate the SBS League into the Symphony through recognition in our program book, and on the website, and by incorporating their database



Cornerstone III: Community Contribution

Objective: Provide educational and community engagement programs that bring the enrichment of music to our local community

Goals:

- Provide a music education program that inspires a passion and appreciation for classical music in people of all ages
- Maintain a first-rate, thriving youth orchestra that is fully integrated into the operation of the Santa Barbara Symphony



Cornerstone III: Community Contribution

Goal 1: Provide a musical education program that inspires a passion and appreciation for classical music

Strategies:

- Maintain Flagship programs
 - Concerts for Young People
 - Music Van
 - Informances
 - Outreach Passes/Musical Mentors
 - After School Strings Workshops
- Collaborate with other organizations which foster music education
- Provide compelling, exciting, and well-promoted pre-concert talks
- Expand community programs



Cornerstone III: Community Contribution

Goal 2: Maintain a first-rate, thriving youth orchestra program that is fully integrated into the operation of the SBS

Strategies:

- Develop a comprehensive transition plan which will lead to increased financial and musical support for the youth orchestra
- Expand interaction between the SBS and the youth orchestra



Cornerstone IV: Financial Strength

Objective: To maintain a strong board and staff to maximize community, corporate and foundation support. To raise adequate income to sustain our artistic and community goals.

Goals:

- Develop comprehensive fundraising plan
- Create a balanced and realistic budget with adequate reserves to support SBS operations in a challenging environment
- Create and measure ourselves against specific milestones for top line growth
- Ensure a transparent, efficient operational structure that can be measured against bottom line goals
- Establish a strong, active and dedicated board
- Maximize support for and of the Symphony League



Cornerstone IV: Financial Strength

Goal 1: Develop comprehensive fundraising plan

Strategies:

- Launch an active endowment campaign
- Support Symphony League
- Maximize Annual Sustaining Fund Drive and Grant Income
- Develop a state-of-the-art planned and deferred giving program as part of long range plans to raise funds for the endowment
- Maximize contributions from the business community by enhancing prestige of the Business Council
- Maximize sponsorship programs by identifying and marketing attractive new opportunities
- Increase financial support for the symphony's education programs
- Explore introducing signature annual event as a cornerstone of the fundraising efforts



Cornerstone IV: Financial Strength

Goal 2: Create and measure ourselves against specific milestones for top line growth

Strategies:

- Set specific budgeted targets for subscription and single ticket sales and measure ourselves against these guidelines
- Insure adequate resources and board support to allow the Executive Director to efficiently implement the goals of the organization
- Set specific budgeted targets for the SBS League fundraisers and measure them against those goals
- Create specific business plans and financial tools to measure the profitability of specific events and programs



Cornerstone IV: Financial Strength

Goal 3: Ensure a transparent, efficient operational structure that can be measured against bottom line goals

Strategies:

- Create an expert and experienced staff of adequate size to execute efficiently the operational goals of the organization
- Create clear job descriptions, clear accountability, and a consistent evaluation process
- Improve financial visibility and accounting
- Create a balanced and realistic budget with adequate reserves to support SBS operations in a challenging environment



Cornerstone IV: Financial Strength

Goal 4: Establish a strong, active and dedicated board

Strategies:

- Expand responsibilities of the Nominating Committee to the area of Governance with responsibilities for recruiting, nominating and providing effective orientation for new board members
- Create policies and guidelines with specific goals for board development and composition
- Develop a board leadership and officer succession plan
- Institute a board book for every board meeting, complete with agenda, top issues, and an action plan
- Create a charter, job description, and annual goals for each committee
- Create a recognition program to celebrate current and past board members
- Foster Board Community



Diversity Policy

To be a welcoming organization that actively pursues diversity in its Board Musicians, Audience, Staff, Programming and Educational Programs.



Planning Committee

Judith Kuipers – Chair

Rich Aberle

Walter Beust

Helene Beaver

Sandra Chan

Charles Greene

Linda Hedgepeth

John Robinson

Nicole van Dam

Marsha Wayne

Laury Woods

Peter Pastreich – Consultant

Benjamin Wayne - Consultant



A Brief Description of the Planning Process

The Strategic Planning Process was guided by the Santa Barbara Symphony's Executive Vice President, Dr. Judith Kuipers, who brought extensive planning experience from her background leading institutions of higher learning. The steering committee was comprised of seven experienced Board Members, including the current President and two past Presidents, two senior staff members and one musician member of the orchestra. The committee also engaged Peter Pastreich as a consultant to the process. Pastreich left the San Francisco Symphony in 1999, after having served as its Executive Director for twenty-one years, during its period of most dramatic growth, to work more extensively in two areas that have long interested him: training orchestra administrators and consulting to arts institutions, particularly in the area of strategic planning.

The steering committee met in September 2003 to determine the scope of the plan, reach some conclusions about the current condition of the orchestra and to set preliminary goals for the future. In November, the full board, staff and orchestra was included in a day-long retreat facilitated by Kuipers and Pastreich. We emerged from the retreat with a broad-based understanding of what the key goals would be, and how the work would be accomplished.

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Planning Process (continued)

Over the next two months, the staff, working with guidance from the steering committee and Pastreich, conducted field research and fleshed out the goals and objectives. The full board convened for a second all-day retreat in mid-February 2004, working together to unify the goals and build consensus.

The work of the Strategic Planning Committee continued throughout the Spring as the Plan took shape and the timeline and budget were applied. Financial and logistic realities caused several priorities to be shifted with corresponding changes to the timeframe. **In July,** Benjamin Wayne was brought in to assemble and craft the disparate ideas into a strategic plan that would be easy to understand and actionable. We are proud to offer this Strategic Plan to our Board and our broader family as a document that will serve the Santa Barbara Symphony well over the next several years.



Statement of Appreciation

The Santa Barbara Symphony would like to thank the Mosher Foundation for its generous support of our Strategic Planning Process with deepest gratitude to Maggie Mosher for her belief that music touches us all, expressing more powerfully than any other medium our creativity, beauty and passion for life. We are also grateful to Dr. Edward Birch for his stewardship of the Mosher Foundation, and for taking such a personal interest in supporting our planning process.

The steering committee is also grateful for the contributions of Walter Beust (President 1989-1992), who spearheaded the Symphony's strategic planning effort in the early 1990's, the beneficial results of which are still very much evident in today's symphony. And Ardis Higgins' (President 1986-1989) definitive book on the first 50 years of the Santa Barbara Symphony was indispensable in preparing this plan.

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Appreciation (continued)

The plan would not have been possible without the exemplary leadership of Linda Hedgepeth, the Board President when the plan was begun, and Marsha Wayne, who will implement the first phases of the plan during her tenure as President. We were honored to work with Peter Pastreich, who brought great clarity of thinking to the task, and went above and beyond the call of duty to provide us with the benefits of his experience and wisdom.

Finally, we would like to praise Judy Kuipers for her leadership throughout the yearlong process. It was her insistence that we invest in a plan, and her vision of what the plan could mean for the Santa Barbara Symphony that ensured that this plan was made a top institutional priority. The final plan is a result of her well-conceived and well-executed process that ensured that the plan was embraced by all and that it will become the roadmap for the continued success of the Santa Barbara Symphony.

