



**Winston-Salem Symphony Association, Inc.**  
**Five Year Strategic Plan**

APPROVED BY THE BOARD OF DIRECTORS  
ON MAY 31, 2012

## FORWARD

The Winston-Salem Symphony Association, Inc. (the “Symphony”) is one of oldest and most respected professional arts organizations in North Carolina’s Piedmont Triad. Started in 1946 on the campus of Salem College as a Civic Orchestra, the Symphony incorporated as a non-profit North Carolina corporation in 1952 and hired its first full-time conductor in 1955.

During the past 65 years, we have grown into a nationally recognized regional orchestra employing 75 professional musicians on a per service basis. Currently, the full orchestra performs 37 concerts per year. The Symphony also boasts a 96-voice volunteer Chorale and an inspiring music education program including in-school ensemble programs, young people’s concerts and a Youth Orchestras program consisting of three youth orchestras. Education programs produce over 28,000 student encounters annually.

The Symphony is governed by a volunteer Board of Directors comprised of 40 elected and 7 *ex-officio* Directors. Artistic leadership is currently provided by Robert Moody, who has served as Music Director for 7 years; the administrative team is currently led by Merritt Vale, who has served as President and CEO for 13 years. Several advisory councils and a volunteer organization called *The Encore Society* provide additional support to the organization.

In comparison to other professional orchestras across the country, the Winston-Salem Symphony is in a solid position. 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 are facing 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
- Relevance to younger and more 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 effect change rather than respond to crises. 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 fully engages the Piedmont Triad community in our success.

## STATEMENT OF PURPOSE

Through a 9 month planning process involving Board and staff members, musicians, volunteers, community leaders, and others, the Winston-Salem 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.

*The **vision** of the Symphony is to touch everyone with music.*

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.

*Therefore, our **mission** is to be a catalyst for an inspired community through live and innovative 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 brand loyalty across the Triad 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 incremental funding support for 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 administrative functions, concerts and other programs, as well as certain priorities in key issue areas of the strategic plan
- **Venue.** Presenting programs 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, our objective is to ensure that even they are specific. We also intend to develop incremental tactics and related metrics that make the achievement of our qualitative goals measurable. With quantitative goals and metrics on the achievement of tactics associated with 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-alignment 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 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 have attached 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.

## **PRIORITIES/GOALS**

**Understand audience needs and implement tactics to communicate with various audiences about who we are.**

**Grow both existing and new audiences.**

**Create enriching audience experiences both inside and outside the concert hall.**

**Promote the cultivation and engagement of advocates.**

## **AUDIENCE DEVELOPMENT**

*To build long-term, sustainable, and diverse patron relationships that cultivate brand loyalty across the Triad region.*

## **OBJECTIVES AND INITIATIVES**

***Apply traditional market research and communication techniques to our audience.***

- Conduct audience and community surveys and listening tours that help us better understand audience preferences (including generational and other preferences around programming, schedule, venue and other concert variations).
- Determine and analyze current and prospective audience demographics in order to inform decision-making on future efforts.
- Use diverse communication tools to reach different audiences and improve overall community awareness.

***Prioritize and focus the development of our audiences.***

- Fully execute the current marketing plan; invest in sales strategies focused on saturating our current market before investing substantial dollars in attracting new markets.
- Use sales tools, as well as public relations and education initiatives, geared towards target market segments.
- Develop programmatic offerings that satisfy the interests of existing audiences and reach new audiences.
- Develop partnerships with organizations successfully serving the diverse audiences we seek to cultivate.

***Update the tools and techniques we use to make concerts fun.***

- Use technology to enhance the audience experience; where appropriate, use technology to make the in-hall concert experience more interactive and participatory.
- Improve the social aspects of attending concerts, to include fun and exciting pre-concert, intermission and post-concert experiences.
- Leverage social media in a way that engages audiences and enables them to support our marketing initiatives.
- Develop programs and repertoire that can be enjoyed outside of the hall, throughout the community.
- Integrate educational and inspirational experiences with music programming.
- Create opportunities for audiences to interact on our website, or by social media, with musicians and the Music Director.

***Using branding to our advantage.***

- Define and develop the Winston-Salem Symphony brand in a way that highlights artistic excellence, lifelong learning and community involvement.

## **PRIORITIES/GOALS**

**Make education an institutional priority.**

**Maintain a thriving Youth Orchestras program.**

**Create technology based music education opportunities.**

**Develop a Community Outreach Program.**

## **EDUCATION**

*To provide educational and community engagement programs that bring the joy of music to our local and regional communities.*

## **OBJECTIVES AND INITIATIVES**

### ***Improve existing programs.***

- Engage a full-time Education Director.
- Develop and implement a methodology for evaluating our current education programs.
- Restructure and improve existing programs based on the outcomes of the evaluation process.
- Rename and rebrand our education programs, as appropriate, to make them visible and marketable.
- Create opportunities for music students to interact with symphony musicians.
- Provide “hands on,” active experiences for youth to experiment with music.
- Engage with music educators to determine how we could better serve them.

### ***Grow and raise the profile of the Youth Orchestras program.***

- Elevate the role the Youth Orchestra plays in our overall education strategy.
- Better integrate Youth Orchestra Council initiatives with Board initiatives.
- Provide programs to foster excellence both in the artistic and personal development of young musicians, by developing experiences that challenge and develop musical ability and appreciation, inspire imagination and excellence and create future stewards of the arts.
- Use funding from and collaborations with other local organizations to reach young musicians who are part of underserved communities.

### ***Use the Internet as an education tool.***

- Create and/or provide connections to age-appropriate online music education opportunities for music students and teachers.

### ***Find ways to give back.***

- Provide free instrument instruction for underserved students.
- Promote orchestra musicians as fee-paid instructors and professional artists for hire.
- Create opportunities for amateur musicians (adults) who want to be actively engaged in playing an orchestral instrument to perform together.
- Develop and share community programs that build music appreciation.

## PRIORITIES/GOALS

**Steward and grow contributed and earned revenue.**

**Create and implement an integrated development plan that includes annual giving, planned giving and endowment components.**

**Develop quantitative goals against which to measure success.**

## FINANCE

*To ensure the enduring financial growth of the organization and provide incremental funding support for the needs of the strategic plan.*

## OBJECTIVES AND INITIATIVES

### ***Match needs with funding.***

- Develop a rolling 5-year strategic financial projection. Within the first year of the plan, establish a financial projection that identifies and quantifies, by year, total plan execution expenses and sources of income.
- Conduct a feasibility study to inform the planning for revenue growth.
- Develop concerts and other program offerings that have significant fundraising potential.
- Proactively consider non-programmatic opportunities to earn revenue for the organization.
- Develop programmatic, social and educational offerings that meet the evolving needs of corporate partners.
- Cultivate a more fundraising-oriented board culture. Use fundraising ability as one of the principal requirements for board membership when cultivating new board members.

### ***Prioritize balance in the development of longer-term fundraising initiatives.***

- Maintain a development focus on recurring income streams by promoting multi-year Annual Fund and other commitments from individual contributors and corporate sponsors.
- Create a Legacy Society to recognize donors who remember the Symphony with a planned gift. Effectively market Legacy Society opportunities with accountants, attorneys and others who influence our donor base.
- Launch an endowment campaign. Retain professional support as needed.
- Build staff and board capacity to focus on a planned giving program while implementing other areas of the development plan.

### ***Build accountability for revenue.***

- During the first year of the plan, 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.

## **HUMAN CAPITAL**

*To attract, engage and retain top talent in musicians, staff and volunteers. To harness and develop the full potential of the organization's human resources.*

### **PRIORITIES/GOALS**

**Enhance internal and external communications.**

**Attract and retain top talent in musicians, guest artists, staff and volunteers.**

**Harness and develop the full potential of the organization's human capital.**

### **OBJECTIVES AND INITIATIVES**

#### ***Make effective communication a priority.***

- Improve internal and external communication between and among orchestra and Chorale musicians, staff, Board, community volunteers and Youth Orchestras musicians and parents.
- Develop a strategy to retain the interest of former Board members, in order to keep them involved and supportive of the Symphony.
- Create opportunities for social interaction between all members of the Symphony family.
- Enhance the visibility and profile of all orchestra musicians and all members of the artistic leadership team.

#### ***Improve talent satisfaction over the commitment being made.***

- Provide market competitive compensation for orchestra musicians and staff.
- Enhance orchestra musician benefits over time (i.e. accident insurance, paid sick day, bereavement allowance, flexible spending accounts, etc.).
- Explore opportunities to provide full-time employment for a small core of the orchestra through the combination of multiple commitments.
- Provide additional services for orchestra members (more rehearsals, more performances, additional series, additional ensemble or chamber work, Piedmont Opera, etc.).
- Improve rehearsal and concert scheduling to reflect and better consider musician workload throughout the year.
- Provide volunteer opportunities that make the Symphony the opportunity of choice throughout the community.

#### ***Provide growth and development opportunities.***

- Provide appropriate staff training opportunities (conferences, seminars, webinars, etc.).
- Seek opportunities to foster and/or promote musician training and development.
- Actively recruit and better incentivize members of the Chorale and Encore.
- Create Chorale performance opportunities outside of performances with the orchestra.
- Establish clear roles and specific expectations for all volunteer groups.
- Improve the organization's coordination with volunteer groups.
- Supplement staff support through the effective use of a volunteer coordinator.
- Develop and implement recognition and reward programs for staff, musicians and volunteers.

## **PRIORITIES/GOALS**

**Ensure the effective use of currently employed technologies.**

**Maximize the use of technology in realizing the mission of the organization.**

**Make purchasing tickets and making contributions more convenient.**

**Make the concert experience more fun.**

**Make it easier for musicians to rehearse and perform.**

## **TECHNOLOGY**

*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.*

## **OBJECTIVES AND INITIATIVES**

### ***Improve current performance.***

- Train all staff to effectively use current office software on and off site.
- Undertake an assessment of all existing administrative hardware and software configurations to ensure that the staff is working with up-to-date equipment and software programs. Update where required.

### ***Enhance the use of technology in key issue areas of the strategic plan.***

- Create a Technology Committee comprised of key users, to design, develop implement and oversee a comprehensive plan for technology and its uses with the organization.
- Partner with organizations and educational institutions that can provide assistance with technology strategy and plan execution on a pro bono basis.
- Hire a full-time staff position to focus on integrating technology in audience development, education and performance enhancements for musicians.

### ***Use technology to enhance the ticket purchase and donation processes.***

- Improve online ticket purchase and donation processes.
- Develop automated systems/processes to sell tickets at offsite performance locations.
- Expand e-ticketing capabilities, as both a tracking tool for audience participation and behavior, and to improve convenience for patrons.

### ***Use technology to enhance the audience experience inside and outside the hall.***

- Develop certain concert programming that uses technology as an integral part of the performance.
- Find ways to use technology to enhance the listening and viewing concert experience.
- Use technology to enhance written programs, program notes, pre-concert education, etc.
- Produce live streaming and web/podcasts of selected performances.
- Provide opportunities for live video chats with musicians and the Music Director.

### ***Use technology to enhance the performer's efficiency and experience.***

- Investigate the feasibility of purchasing software that enhances music library operations and the delivery and readability of music parts for all orchestra players.

## **PRIORITIES/GOALS**

**Ensure that fiduciary obligations to the organization are met with regard to current performance facilities.**

**Maximize audience and musician experiences in current performance facilities.**

**Define a vision for the future. Ensure that the next concert hall meets the needs of the audience and musicians.**

**Use alternative venues as a way to take performances to the community.**

## **VENUE**

*To present programs in venues that provide the highest quality experiences (acoustics, physical space/comfort, technology, social interaction) for audiences and musicians.*

## **OBJECTIVES AND INITIATIVES**

### ***Develop contingency plans for all primary performance venues.***

- Develop a contingency plan for the Symphony's use of the Stevens Center and other current concert venues.
- Establish a multi-disciplinary committee of Board and staff, professional advisors and musicians to consider and develop a plan for future venue requirements.

### ***Enhance the enjoyment of current facilities.***

- Assess customer expectations around current concert venues, including parking, concessions, ticketing, front-of-house, the performance, and access to convenient pre and post concert attractions, such as restaurants, coffee shops, etc.
- Assess musician expectations of the rehearsal and concert venue experience.
- Implement changes that can be made with relative ease to enhance the venue experience for both audience and performers.

### ***Develop a thoughtful plan for future facilities.***

- Define the organization's goals and criteria for the "ideal" venue.
- Identify current venues that are candidates for renovation, as well as potential locations for newly constructed venues.
- Select and secure one or more sites.
- Identify potential partners and determine how they should be included in our thought process.
- Engage one or more consultants to assist with the process.
- Develop a communications plan.

### ***Identify and use diverse venues to support community engagement objectives.***

- Actively seek opportunities to perform in large or small groups away from the Stevens Center.
- Develop partnerships with other organizations that have access to desirable performance facilities, both traditional and non-traditional.
- Develop programming that is versatile enough for use in different sized venues.

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(Attachment to WSS Strategic Plan)  
**TIMELINE OF ACHIEVEMENT\***  
**May 31, 2012**

|                             | 2012-2013   | 2013-2014   | 2014-2015  | 2015-2016  | 2016-2017  |
|-----------------------------|---|---|--|--|--|
| <b>AUDIENCE DEVELOPMENT</b> | <p>Conduct audience and community surveys.</p> <p>Analyze information.</p> <p>Fully execute current marketing plan including continuous sales strategy</p> <p>Improve social aspects of attending concerts.</p>   | <p>Define and develop WSS Brand.</p> <p>Develop partnerships with organizations serving audiences we want to reach.</p> <p>Crete programs and repertoire that can be enjoyed outside the concert hall.</p> <p>Integrate educational and inspirational experiences.</p> <p>Leverage social media to engage audiences.</p>  | <p>Develop programmatic offerings to reach new audiences.</p> <p>Use diverse communications to reach different audiences.</p> <p>Use sales tools &amp; education initiatives geared to target market segments.</p>   | <p>Create opportunities for audiences to interact with music director etc. on website or social media.</p> <p>Use technology to enhance the audience experience.</p> |  |
| <b>EDUCATION</b>            | <p>Engage Education Director.</p> <p>Evaluate current offerings.</p> <p>Engage with local educators.</p> <p>Promote musicians as fee-paid instructors.</p>  | <p>Restructure education offerings.</p> <p>Rename and rebrand education offerings.</p> <p>Better integrate Youth Orchestra Council initiatives with symphony initiatives.</p> <p>Elevate the role of the youth orchestras.</p> <p>Provide programs to foster artistic and personal excellence.</p>  | <p>Create opportunities for students to interact with symphony musicians.</p> <p>Provide active “hands on” experiences.</p> <p>Create online music education opportunities for youth orch.</p> <p>Develop and share community programs that build music appreciation.</p> <p>Use funding from collaborations to reach the underserved youth.</p> | <p>Create online music ed opportunities for music teachers and students.</p> <p>Provide free instrument instruction for underserved students.</p>                    | <p>Develop opportunity for adults who want to be actively engaged in playing an orchestral instrument.</p> |
| <b>FINANCE</b>              | <p>Create a 5-year strategic financial projection.</p> <p>Conduct a feasibility study to inform planning for revenue growth.</p> <p>Identify specific metrics to measure and evaluate progress towards our financial goals.</p> <p>Establish a planned giving program.</p> <p>Create a Legacy Society to recognize donors who remember the Symphony with a planned gift in their estate plan.</p> | <p>Cultivate a more fundraising-oriented Board culture.</p> <p>Maintain a development focus on reoccurring income streams.</p> <p>Build staff and board capacity to focus on endowment-building while implementing other areas of the development plan.</p> <p>Proactively consider non-programmatic opportunities to earn revenue.</p> <p>Develop programmatic, social and educational offerings for corporate partners.</p> | <p>Develop concerts and other programming with significant fundraising objectives.</p>   | <p>Launch an endowment campaign.</p>   |  |

|                      | 2012-2013   | 2013-2014   | 2014-2015  | 2015-2016  | 2016-2017 |
|----------------------|---|---|--|--|-----------|
| <b>HUMAN CAPITAL</b> | <p>Improve internal and external communication between and integration of orchestra musicians, Chorale, staff, Board, volunteers and Youth Orchestra musicians and parents.</p> <p>Create opportunities for social interaction between all members of the Symphony family.</p> <p>Provide appropriate staff training opportunities.</p> <p>Supplement staff support through the effective use of a volunteer coordinator.</p> <p>Establish a role and specific expectations for volunteer groups.</p> <p>Enhance musician benefits over time (and staff as needed).</p> | <p>Enhance the visibility and profile of all musicians and all members of the artistic leadership team.</p> <p>Provide market competitive compensation for musicians (and staff as needed).</p> <p>Implement improved rehearsal and concert scheduling to better accommodate musicians.</p> <p>Create performance opportunities for the Chorale, in addition to performances with the orchestra.</p> <p>Improve coordination with volunteer groups.</p> <p>Actively recruit and better incentivize members of the Chorale and Encore.</p> | <p>Develop and implement recognition and reward programs for staff, musicians and volunteers.</p> <p>Seek opportunities to foster and/or promote musician training and development</p> <p>Provide volunteer opportunities that make the Symphony the volunteer opportunity of choice in the community.</p>   | <p>Provide more services for orchestra members.</p> <p>Explore opportunities to provide salaried employment for a small core of the orchestra.</p>               |           |
| <b>TECHNOLOGY</b>    | <p>Undertake an assessment of all existing hardware and software configurations to ensure that the staff is working with up-to-date equipment and software programs. Update where required.</p> <p>Train all staff to effectively use current office software on and off site.</p> <p>Create a Technology Committee comprised of key users, to develop, comprehensive plan.</p>   | <p>Develop a case for and hire a full-time staff position to focus on integrating technology in audience development, education and enhancements for musicians.</p> <p>Improve online ticket purchase and donation processes.</p> <p>Develop systems/processes to sell tickets at offsite performance locations.</p> <p>Identify ways to use technology to enhance the concert experience.</p> <p>Partner with organizations that can help strategize and execute on tech plans.</p>  | <p>Implement the use of new technologies to enhance audience experiences inside and outside the hall.</p> <p>Provide opportunities for live video chats with senior music team.</p> <p>Expand e-ticketing capabilities.</p> <p>Develop certain concert programming that uses technology as an integral part of the performance.</p> <p>Use technology to enhance written programs, program notes, preconcert education, etc.</p> | <p>Investigate the feasibility of purchasing and populating music library software.</p> <p>Provide live streaming and web/podcasts of selected performances.</p> |           |

|              | 2012-2013   | 2013-2014   | 2014-2015  | 2015-2016  | 2016-2017 |
|--------------|---|---|--|--|-----------|
| <b>VENUE</b> | <p>Develop a contingency plan for the Symphony's use of the Stevens Center and other current concert venues.</p> <p>Assess customer expectations around the current concert venues.</p> <p>Assess musician expectations of the rehearsal and concert venue experience.</p> <p>Establish a multi-disciplinary committee to develop the venue plan.</p> <p>Develop a communications plan.</p> | <p>Implement changes that can be made currently to make the venue experience a more enjoyable for both the audience and performers.</p> <p>Develop programming that is versatile for use in different sized venues.</p> <p>Identify potential partners and determine how they should be included in our thought process.</p> <p>Develop partnerships with other organizations that have access to desirable performance facilities, both traditional and non-traditional.</p> <p>Actively seek opportunities to perform away from the Stevens Center.</p> | <p>Engage one or more consultants to assist with the process.</p> <p>Define the organization's goals and criteria for the "ideal" venue.</p> | <p>Identify current venues as well as potential locations for future venues.</p> <p>Select and secure one or more sites.</p> |           |

\*Years 2012 – 2014 focus on study and learning, identifying resources, and “picking low-hanging fruit.”

Years 2015 – 2017 focus on implementing more costly initiatives identified in the plan, based on money raised from new funding initiatives.

All initiatives, other than ones based on a point in time, continue across the plan horizon once started.