

“If You Don't Know Where You're Going, Any Road Will Take You There”

When is it Time for a Strategic Plan?

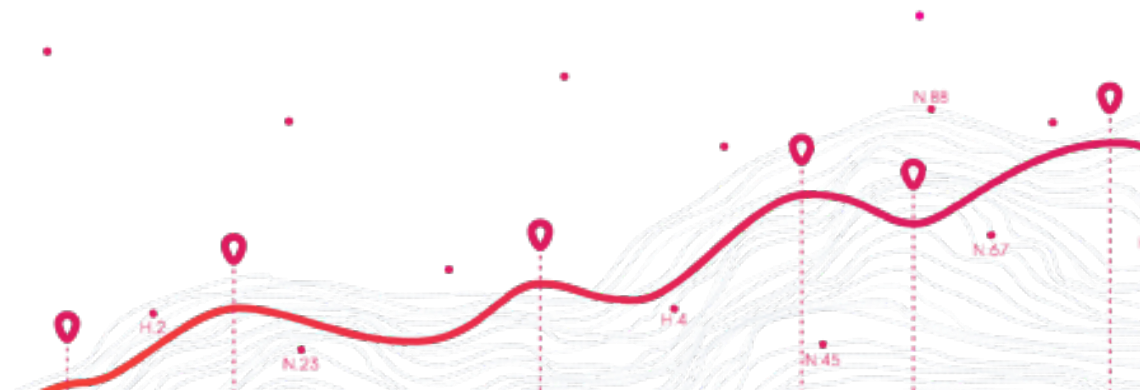
Association of California Symphony Orchestras 2025 Conference

August 9, 2025

Costa Mesa, California



AMS
PLANNING
& RESEARCH



AMS Planning & Research



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AMS Planning & Research is committed to the value of arts, culture, and entertainment in communities.

Our purpose is to help leaders, institutions, and the sector adapt and change to realize ventures that are effective, resilient, and vital.



What we'll cover today

- What is a strategic plan?
- Why develop a strategic plan?
- How is it done?
- When should we start?
- Q&A



The Basics



Definition

What is a strategic plan?

- A set of agreed upon **goals and actions** that will advance an organization's success
- Covering a **defined period** of time
- Used to guide an organization's **decision making**
- And help an organization **measure success**

A strategic plan is...

A compass



A road map



A yardstick





The Benefits

What can a strategic plan do for me?

Planning helps think through big-picture issues and opportunities:

Our market
changed –
**how do we
adapt?**

We have more
programs than
we can
execute –
**what do we
prioritize?**

We have a
structural
deficit –
**what can
we change?**

The orchestra
and executive
leadership
disagree on
direction -
**which way do
we go?**

Board
members are
feeling
disengaged –
**how can we
motive them?**

We have a
potential
new partner
– **should we
expand?**

Staff turnover
is high – do
we need to
**change our
institutional
culture?**

A funder
said we
have to have
a strategic
plan!

A Good Plan Strikes a Balance

When the *value* of an organization is understood by all and balanced with its *capacity* to realize its purpose, with ample *support* for its work...

the result is success.



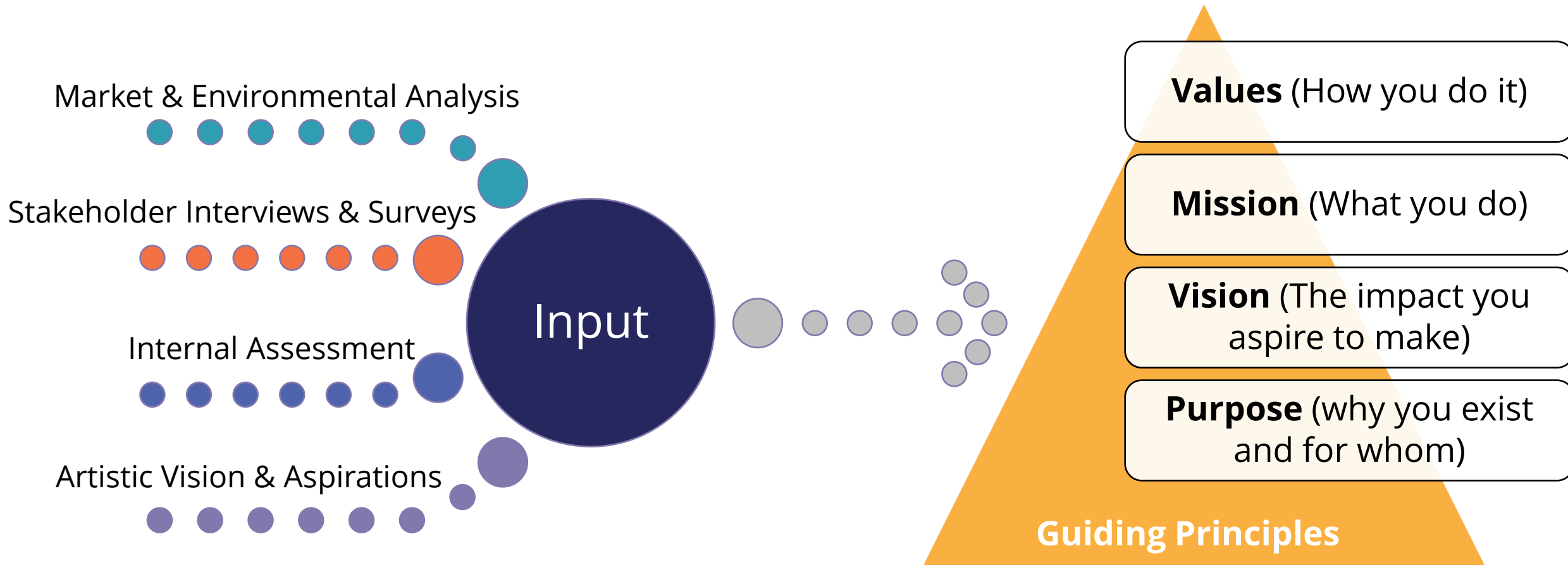
"Strategic Triangle" – Herman 'Dutch' Leonard / Mark Moore
Kennedy School of Government – Harvard University



The Process



A plan starts with gathering input and setting guiding principles



Strategic Planning using the “GOST” Framework



Goals, objectives, strategies, tactics: How they work together

How we use these words

Goal

A broad primary outcome

Objective

What will be accomplished

Strategy

The approach you take to achieve one or more objectives

Tactic

A tool you use to pursue one or more objectives

For example ...

Goal

Learn to play violin

Objective

Master three easy pieces

Strategy

Adopt a practice routine

Tactic

Practice scales daily

Good to know

Goals reflect progress toward the vision and fulfillment of an organization's purpose.

Objectives help identify when specific progress will or can be made, based on measurable indicators. Each goal will have multiple objectives.

Strategies can serve multiple objectives and may inform how specific job functions or departments interact.

Tactics can refer to physical tools, like new equipment, and conceptual tools, like professional development and training.

Example Goal Statements

Strategic Plans often have three to five big goals



Engagement & Enrichment

Build connections with children and adults, reaching the diversity of the region's population



Downtown Hub

Commit to Downtown's placemaking and be a resource to its community of people



Local Resource

Partner with other arts organizations, across visual and performing arts, to strengthen our ecosystem



Distinctiveness

Develop a unique identity through distinctive offerings



Institutional Capacity

Steward our resources (financial, human, and facility) thoughtfully to be a vital institution



Timing



There is rarely a perfect time to start planning

And there are always important factors to consider

Financial
position

Leadership
transitions

Contract
Negotiations

Market
environment

Facilities
management

And more...

Hypotheticals

Would you
start a plan at
this time?
What would
you want it to
accomplish?

- Break into groups of 5 - 6
- Discuss the scenario assigned to your group
- Answer these questions:
 - **When should this orchestra begin a strategic planning process?**
 - **What are the pros and cons of beginning now or deferring?**

Scenario 1: West Coast Philharmonic

- **Budget Size:** \$8 million
- **Market:** Economically challenging
 - Traditional audiences and legacy donors are declining.
 - New residents live further out and commute to job centers.
 - A new city manager is keen to revitalize downtown, including the area where the orchestra's main venue is located.
- **Financial condition:** In decline
 - Earned revenue has been slowly declining over the past decade. Contributed revenue was bridging the gap before the pandemic.
 - The orchestra has an endowment of \$2M, which was \$5M pre-COVID.
- **Leadership:** In transition
 - The long-serving CEO plans to retire in two more seasons.
 - The Artistic Director has been in place for the past seven seasons and has no plans to leave.
 - There is one season remaining on the current collective bargaining agreement.
- **Facility situation:** Stable but not exciting
 - The orchestra's primary venue is a bit dated, but needs no urgent repairs.
 - The operation has not raised rent in several years, but the cost of labor has increased with inflation.

Scenario 2: Coastal Range Orchestra

- **Budget Size:** \$5 million
- **Market:** In growth mode
 - The city is seeing substantial post-pandemic growth, driven in part by an influx of young tech-sector workers and their families.
 - There are a number of new construction projects underway and more in planning stages.
 - City support of the arts has been good, but has not grown substantially in the past decade.
- **Financial condition:** Operating with a structural deficit
 - After decades of good financial health, the orchestra has been operating with a structural deficit averaging 10% since the pandemic.
 - Cash flow is now a major issue at certain times of the year.
 - The orchestra has increased the draw from their \$2M endowment, but it's not sufficient to cover the gap.
- **Leadership:** Relatively stable
 - Executive and board leadership remain in place, but there has been higher board turnover than usual in recent years, due to concerns about finances.
 - They have just signed another 3-season agreement with the union.
- **Facility situation:** Attractive
 - The orchestra's city-owned/operated primary venue has been recently renovated, and city leaders are eager to see it play to full houses as often as possible.

Scenario 3: Bayside Symphony

- **Budget Size:** \$2.5 million
- **Market:** Strong but competitive
 - An affluent suburb surrounded by other suburbs.
 - The market for arts and cultural offerings is strong but crowded throughout this sub-region of a major market.
- **Financial condition:** Strong and stable
 - The orchestra has a small group of loyal major donors and a healthy planned giving program started decades earlier.
 - Ticket sales have largely returned to pre-pandemic levels
 - There is a small endowment of \$500,000 held at a Community Foundation.
- **Leadership:** Conflicted
 - The Executive Director and Music Director were both hired in the last five years and have not communicated a unified vision for the orchestra.
 - The board has evolved into two factions with strong and diverging opinions about whether the organization should diversify programming in an attempt to grow.
- **Facility situation:** Heading into uncertainty
 - The orchestra's nonprofit performing arts center home is in the early stages of renovation planning and a capital campaign.

Scenario 4: California Valley Sinfonia

- **Budget Size:** \$1 million
- **Market:** Challenging for arts, but not competitive
 - The largest city within a largely agricultural region.
 - The arts ecosystem is not strong, but the orchestra is an anchor institution and has few arts and culture competitors.
- **Financial condition:** Strong earned revenue base
 - The orchestra has recently developed a broad audience as the only provider for film + live orchestra concerts in the region, which have driven strong ticket sales.
- **Leadership:** Not fully aligned
 - The Executive Director is the orchestra's long-tenured founder, who is somewhat resistant to change.
 - The Music Director is a recent young and energetic hire, who'd like to explore more ways to reach the community.
 - The board is open to more programming innovations.
- **Facility situation:** In crisis
 - The venue that the orchestra uses suffered a major leak and significant water damage and will be shut down for repairs for at least the next two seasons.
 - The operator expects to significantly raise rents when they are able to re-open.

Scenario 5: Pacific Rim Chamber Orchestra

- **Budget Size:** \$250k
- **Market:** Arts-forward
 - A major city with a robust arts and cultural scene, supported by a number of foundations, donors, and city leadership.
 - In a region with a reputation for a wide variety of very high-level, innovative artistic productions.
- **Financial condition:** Starting out strong
 - The orchestra is a recently-founded early music ensemble with big artistic ambitions.
- Substantial initial support has come from the charismatic founding Executive & Artistic Director's strong pre-existing relationships and ability to attract donors to the vision.
- **Leadership:** Potentially problematic
 - The board has noticed high turnover and low morale among the small number of staff and volunteers and is concerned that it may be due to the Executive & Artistic Director's temperamental behavior.
- **Facility situation:** Flexible
 - The orchestra rents several facilities as needed, in an area with many small venues available.

Questions?

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