

AUGUST 6-8
SANTA ROSA

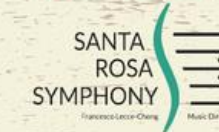
HYATT REGENCY
SONOMA WINE COUNTRY



ASSOCIATION OF CALIFORNIA
SYMPHONY ORCHESTRAS

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HOSTED BY:



Ensuring Your Artistic Legacy: Navigating “Administrative Disasters” in the Arts Sector

Our Presenters

- Dr. Anne Huang, Chief Executive Officer, World Arts West
- Peter Jaffe, Music Director & Conductor, Stockton Symphony Association
- Velma Lim, Past Board President, Stockton Symphony Association
- Caroline Bamforth, President, Sacramento Master Singers
- Facilitator: Tom Clareson, Senior Consultant, Lyrasis; Project Director, Bay Area Arts Readiness Network (BAARN)

A New Category of Disaster

Administrative Disasters

Funding Changes or Cuts

Social/Political Shifts

Succession Planning

Reputational Disasters

Event/tour cancellations

Artwork lost or stolen



ACSO 2026



**Dr. Anne Huang, CEO,
World Arts West**

Transforming a Legacy Arts Organization
to Support Cultural Artists through Economic
Empowerment and Collective Advocacy



Presentation Overview

- Introduction to World Arts West
- Emerging from financial disaster towards economic empowerment
- Transitioning from lack of succession planning to building infrastructure for sustainability
- Addressing unexpected sector wide disasters (pandemic, federal policies)
- Preparation during “blue sky” times





LEGACY - EMPOWERMENT - BELONGING

World Arts West

Who we are & what we
do...



Founded in 1978, World Arts West is a nationally-recognized leader in advocating for cultural dance communities. As a leading world dance presenter, artist service provider, and advocate, World Arts West presents a vital platform for the nation's largest world dance network to build recognition, visibility and intersectional solidarity.



Financial Disaster - Challenges & Response

Long time mismanagement led to 6 figure debt in 2019

- Artists weren't paid
- Funders left WAW
- Unable to continue large scale productions or standard operations

Emergency measures in 2019:

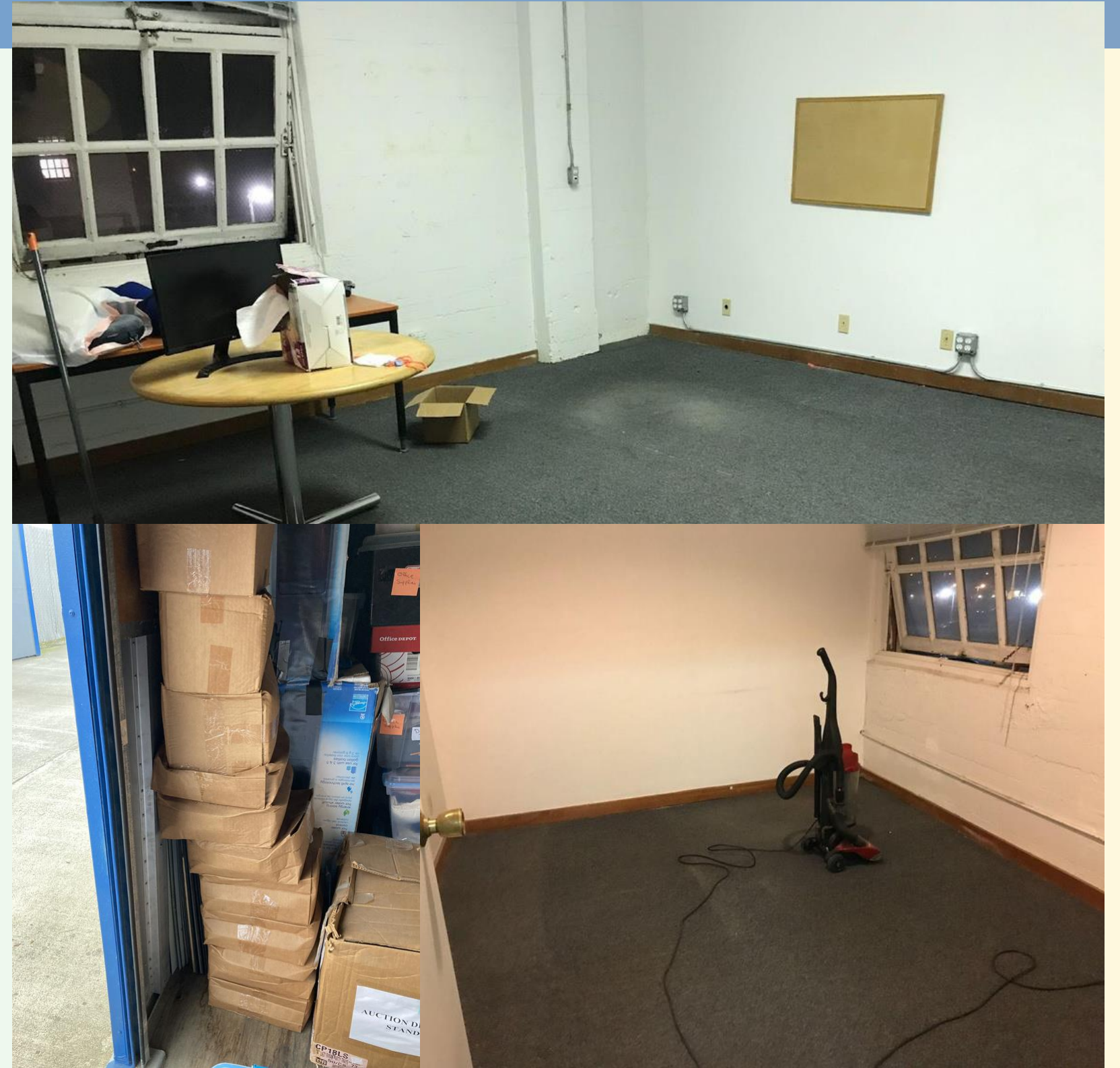
- Emergency fundraising for artist fees
- Drastic measures to decrease overhead (staff layoff, broke rental lease)
- Move out of long time office - offsite storage
- 5 year plan to eliminate debt
- Hired highly competent finance management & fundraising staff
- Reduction of unnecessary accounts



In Public



Behind the Scenes



Financial Disaster - Solutions & Outcomes

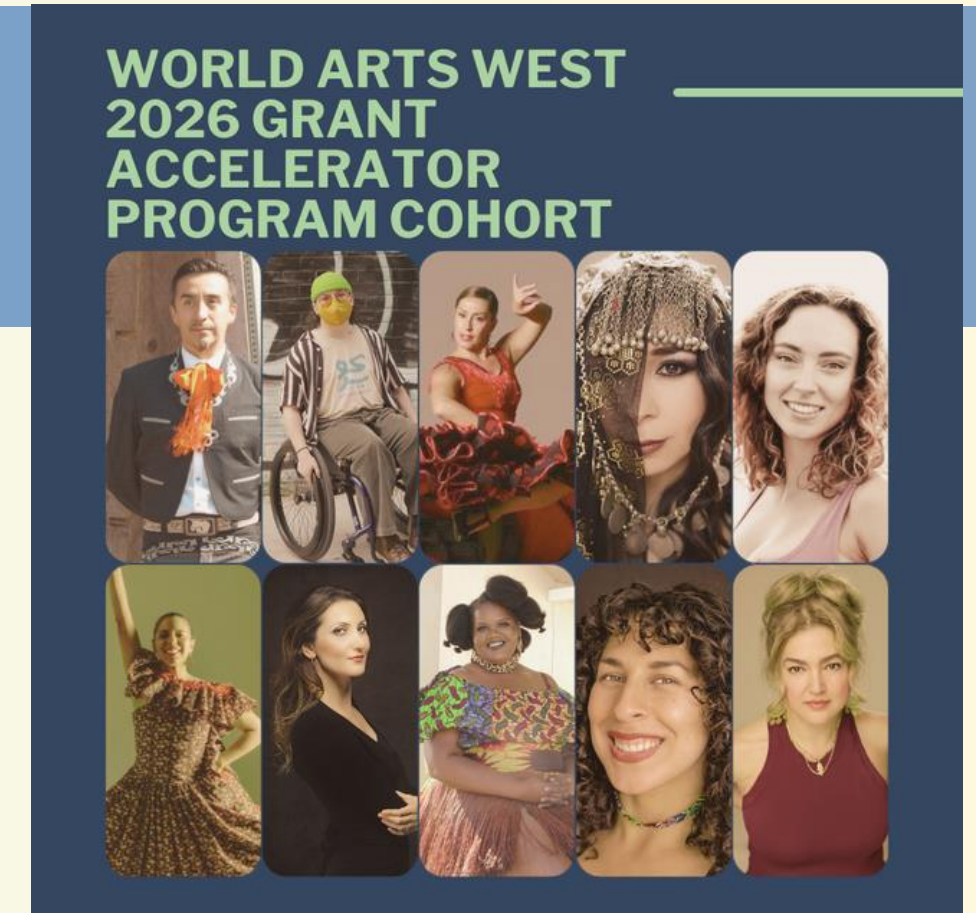
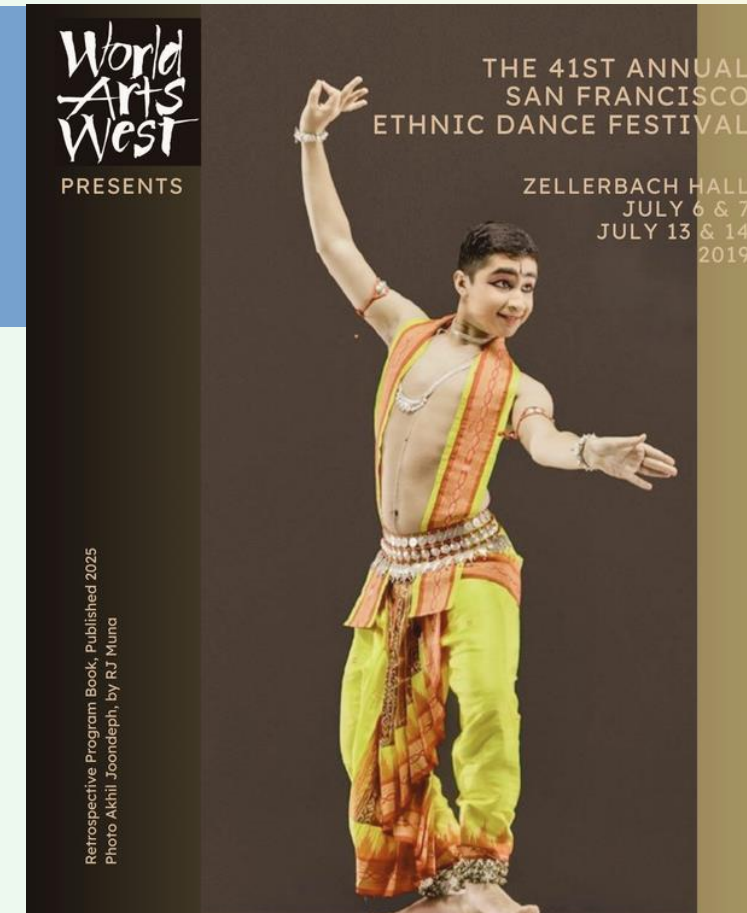
Pathway towards Economic Empowerment 2019-2026:

- Financial stability became org's #1 priority
 - made ALL org decisions through a responsible financial lens
- Increased staff & board literacy
- Gradual expansion of staff
- Dec 2024 - eliminated six figure debt!
- Set up foundation to navigate unexpected financial emergency (NEA grant revoked in 2025)



Four Program Pillars

- 1 - Performances & Artist Panels to feature the artists in our network
- 2 - Equitable resources towards cultural artist economic empowerment
- 3 - Documenting stories & archival preservation to prevent cultural erasure
- 4 - Collective advocacy to fight for visibility, resources, and policies



Lack of Succession Planning at WAW

State of the organization in 2019

- No ED onboarding
- No board or staff succession plan or support
- Org was in financial disaster handed a shell, no road map
- Records in disarray and inconsistent
- Outdated website, accounts
- Lack of written operational protocols
- Strong board pushback on ED's equity vision



Succession Planning - Pivoting a Legacy Organization

its difficult for legacy organizations to pivot

- Community, artists, staff, board, may hang on to old ways
 - nostalgia, prestige, colonial mindset
- Popular festival that people wanted to continue the same way:
 - accusations of incompetence, straying from mission
 - a few loud voices
- Articulate and justify the pivot
 - communication strategy
 - one-on-one conversations
 - people don't have the whole story - transparency
- Holding to your course under criticism until there is success and proven results

Transitioning from lack of succession planning to
building infrastructure for sustainability

Succession Planning - Strategies to Rebuild 1

Strategies to build WAW infrastructure 2019-2026

- Radical imagination to uplift cultural artists towards organizational leadership
- Board pushed back on team changes to build solvency
- Built community coalition and board resigned
- Build majority cultural artist board + staff
- Listened to community and evolved org vision
- Programmatic and financial diversification
- Successful new programs
- Highly cultural competent team

A yearlong capacity-building initiative designed to address long-standing inequities in arts funding that have disproportionately impacted culturally specific, community-rooted dance artists and organizations.

GRANTS ACCELERATOR PROGRAM GAP

The World Arts West Grants Accelerator Program (GAP) is a free, year long mentorship and training program that helps culturally-rooted dance artists build skills, confidence, and success in securing foundation and government grants to help stabilize and grow their organizations.

Customized Services

- 11 Monthly Webinars
- One-On-One Coaching
- Proposal Reviews and Feedback
- Monthly Resource Newsletters
- Peer Network of Cultural Artists

Impact at a Glance (2022-2025)

- Collectively, to date, GAP participants have raised over **\$1.4 million**
- Total grants awarded: **57**
- Average grant amount: **\$24,500**
- Most frequently awarded amount: **\$5,000**
 - Next most frequent award: **\$10,000**
 - Next most frequent award: **\$50,000**
- Number of organizations/artists served: **23**
- Number of cultural communities served: **16**
- First-time-ever grant awardees: **3**

LEARN MORE:
andrea@worldartswest.org
worldartswest.org

"They were accessible and knowledgeable about what grants would fit for our organization."
~Jesus Cortes, GAP Participant
Artistic Director, Cuicacalli

WORLD ARTS WEST
Cuicacalli Dance Company
GAP Participant, Grants Recipient
Photo (below) by Mark Shigenaga
World Arts West's DITP 2022

GAP Success Story
Fogo Na Roupa, San Francisco bateria and bloco, became a first time grant recipient as a GAP participant.

Fogo Na Roupa - Culture Bearers, Educators, Community Builders
Serving the SF Bay Area for 36 years!

I came in skeptical about grant writing, fearful and feeling as if we would not qualify or have the skills to apply or even write the grant. Krista and Anne were very patient and encouraging - truly gave me so much confidence in the work we do."
~Metzi Henriquez, GAP participant
Artistic Director, Fogo Na Roupa

- Fogo Na Roupa, received their first grant from Alliance for California Traditional Arts (ACTA), for \$12,500, after joining World Arts West's Grants Accelerator Program (GAP).
- The grant fully funded their Sparks of Fogo Youth Program for SF Carnaval season 2024. Fogo Na Roupa was the grand champion of SF Carnaval 2024!
- The ACTA grant was their first grant since Fogo Na Roupa was founded in 1989. It was the first time they were able to pay instructors and provide free programming for their youth.
- Their youth program expanded to 85 participants ranging from ages 5 to 18.
- Receiving the ACTA grant helped stabilize their work, allowing Fogo to use private donations in other areas, improve the quality of their work, and make greater investments in the youth they serve.

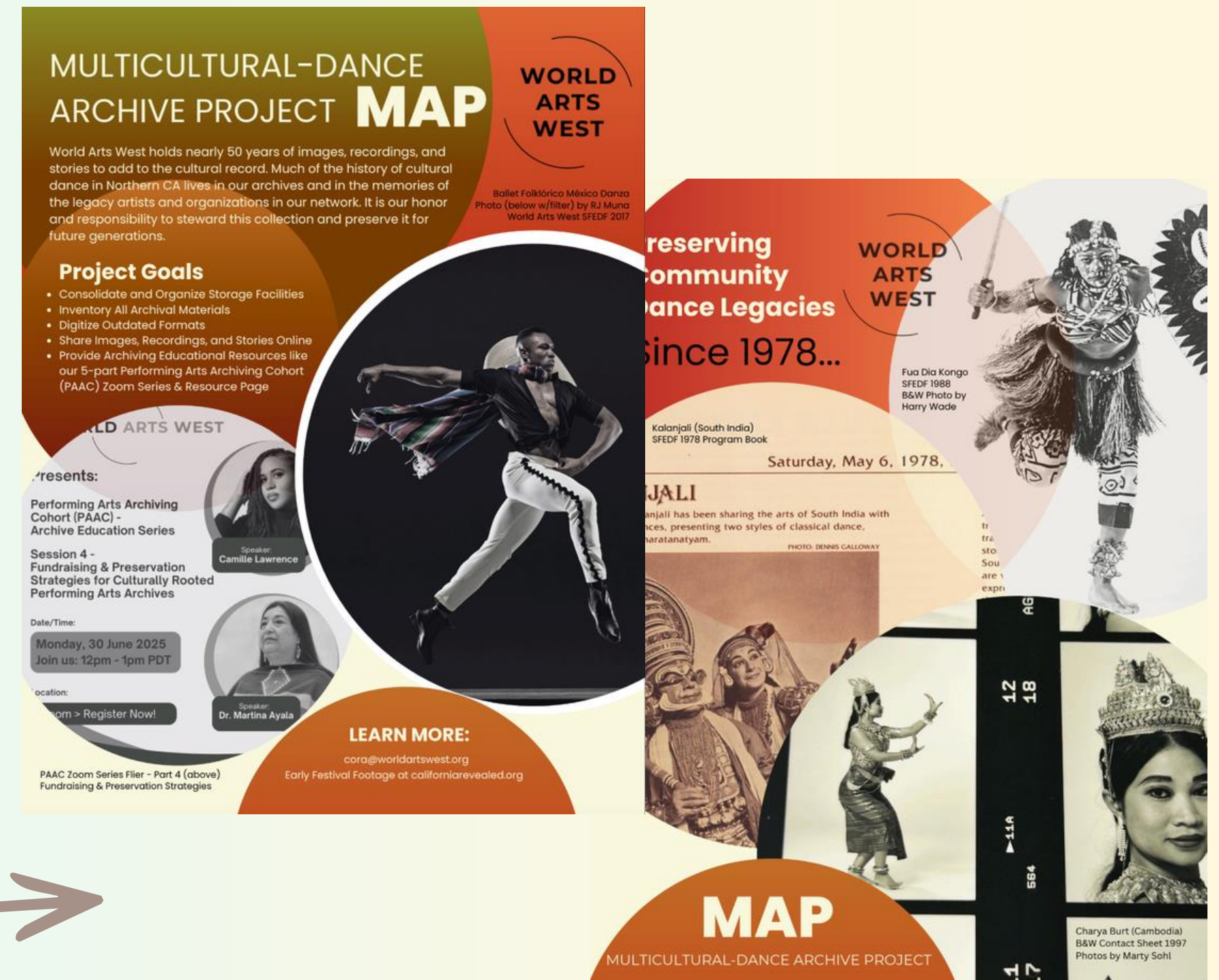
Fogo Na Roupa
GAP Participant, Grants Recipient
World Arts West's SFEDF 2017
Photo (below) RJ Muna

GAP
GRANTS ACCELERATOR PROGRAM

Succession Planning - Strategies to Rebuild 2

Strategies to build WAW operations 2019-2026

- New payroll firm, Donation & Electronic payment platforms, Social media platforms
- Written operational protocols
- Regularly audit systems and improve our systems
- New vendors - insurance, phone, etc
- Project management tools for improved operations
- Inventory physical storage, Digitizing archival materials



Sector Wide Disasters

2020 Pandemic

- offering online programs
- securing pandemic relief funds



NEA Grant Revoked

- Losing \$60,000 was highly detrimental to our organization
- Had to quickly pivot festival
- Uncertain future for the NEA



Being Prepared

Stay Informed

- Watch the news - how could your org be affected?
- Politics, policies, weather
- Plan for different scenarios

Diversify Programs and Revenue

- New funding for service programs vs performance production only
- Create an operating reserve
 - (minimum 3 months) move toward 6 mos - 1 year

Operate with your means

- Don't try to keep to keep doing the same if you can't - change your programs if necessary
- Communicate to the community why changes are necessary
 - videos, email, social posts

Being Prepared - Org Infrastructure

Schedule regular operational clean-up

- Digital files (e.g. G-drive)
- Media files (photos, videos)
- Org G-drive

Annual audit & updates

- Operations manual (“how to” protocols)
- Staff handbook
- Job descriptions
- Board manual
- Rental lease
- Contract templates
- Accounts & Vendors (insurance, suppliers, etc)
- Off-site storage

Thank you! Any questions?



anne@worldartswest.org

*Celebrating
25 Years
with*

 **stockton
symphony**
PETER JAFFE
MUSIC DIRECTOR





STOCKTON SYMPHONY

PETER JAFFE | MUSIC DIRECTOR

Administrative Disaster -- Loss of CEO/Executive Director and Role of Board of Directors – Continue Operations

1. Board President/Executive Committee to take the lead.
2. Comforting and condolence to bereaved family.
3. Communicate to staff, supporters, donors, and public of CEO loss (prepared statement with family's consent, phone calls, memorial tribute on website, etc.)
4. Comply with Executive Employment Contract terms. (role of life insurance.)

Administrative Disaster -- Loss of CEO/Executive Director and Role of Board of Directors – Continue Operations

5. Pros & cons of hiring an Interim CEO/Executive Director.
6. Assess staffing roles & compensation.
7. “The Show Must Go On”
8. Hold weekly staff meetings.
9. Frequent reports to Board of Directors.

Administrative Disaster -- Loss of CEO/Executive Director and Role of Board of Directors – CEO Search

1. Form Search Committee (Board, staff, musicians, affiliate groups, major supporters/donors)
2. Pros & cons of hiring an executive search firm.
3. Prepare a calendar for search process.
4. Develop or revise CEO/Executive role description.
5. Place recruitment notices with ASCO, Indeed.com, ZipRecruiter, Music America, League of American Orchestras, word of mouth, etc.

Administrative Disaster -- Loss of CEO/Executive Director and Role of Board of Directors – CEO Search

6. Set agenda for every Search Committee Meeting.
7. Review resumes, present, and select first round candidates.
8. Prepare first round interview questions and information packets for Zoom interview.
9. Assess first interviews and select candidates for second, in-person interview.
10. Prepare second round interview questions and budget packets for in-person interview.

Administrative Disaster -- Loss of CEO/Executive Director and Role of Board of Directors – CEO Search

11. Host in-person second interview candidates – lunches & dinners.
12. Conduct second interviews in groups with Board members, staff, musicians, affiliate groups, donors/supporters.
13. Candidates to prepare a 1-2 page suggested business plan.
14. Board of Directors receives comments and recommendations from staff, musicians, affiliate groups, donors/supporters.
15. Board of Directors makes hiring decision in closed session.

Thank You for Your Support

Inspire Joy & Build Community
Through Music

Velma Lim, Past Board President
Stockton Symphony Association
7400 Shoreline Drive, Suite 4
Stockton, CA 95219
(209) 951-0196



Ensuring Your Artistic Legacy: Navigating “Administrative Disasters” in the Arts Sector

How a Volunteer Chorus Navigated a 40-Year Artistic Director Transition

Caroline Bamforth

President, Sacramento Master Singers

ABOUT US

Who We Are

An auditioned volunteer community chorus, established in 1983, performing at a professional level.



~\$150K

Annual operating budget



50

Auditioned singers



6

Board members — mostly singers



1983

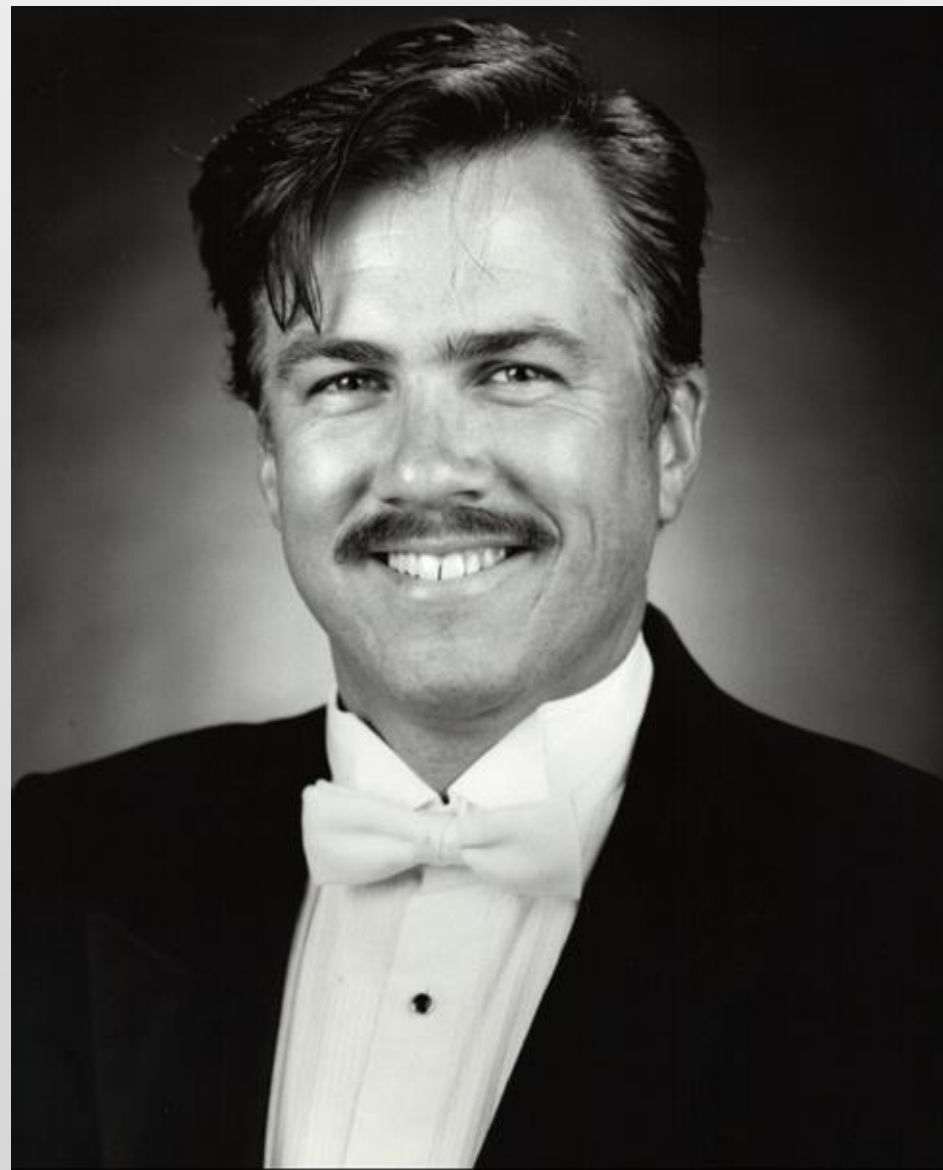
Founded — 40+ years of history

Staffing

Artistic Director · Assistant Director · Accompanist · Marketing & Patron Services (12 hrs/week)

40 YEARS OF ARTISTIC LEADERSHIP

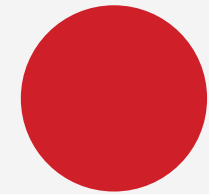
Dr. Ralph Hughes



1986

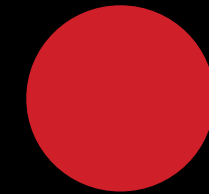


2026



The Situation

- Artistic Director retiring after 40 years
- Volunteer board
- Limited budget
- Limited part-time staff
- No consultant



The Risks

- Membership decline
- Donor uncertainty
- Loss of institutional knowledge
- Internal conflict
- Poor candidate fit

Succession planning is risk management.

THE PLAN

We Couldn't Afford a Search Firm

So, we built our own.



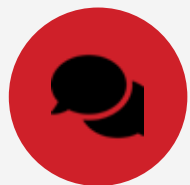
Timeline



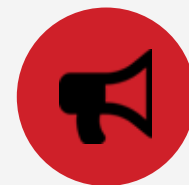
Committee Chair & Search Committee



Candidate Evaluation Rubric



Community Feedback



Communication Plan

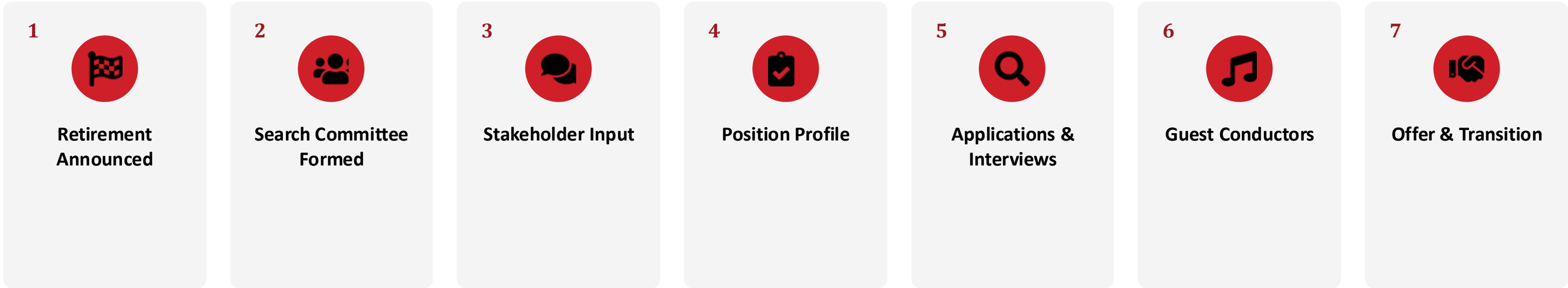


Transition Plan

STEP 1

Start Early

We gave ourselves an 18–24 month timeline.



STEP 2

Decide What Success Looks Like

*Not **WHO.** **WHAT.***



Musical Excellence



Community Engagement



Educational Leadership



Fundraising



Collaborative Style



Commitment to DEI



Organizational Fit

STEP 3

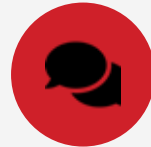
Build a Fair Process

1



**Application
Review**

2



Interviews

3



Reference Checks

4



Guest Conducting

5



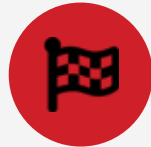
Singer Feedback

6



Board Discussion

7



Decision

A NOTE ON PROCESS

It's OK to Change the Plan

You can plan a process carefully, and still adapt when the circumstances are right.

WHAT WE PLANNED

Two finalists, each spending time with the choir before a final decision.



WHAT WE DID

One candidate was clearly the right fit, so we moved forward without a finalist round. They still worked with the choir and conducted two pieces in concert, giving our audience and patrons the chance to get to know them.

STEP 4

Communication



Board



Singers



Donors



Audience



Artistic Director



Candidates

Transparent and consistent communication ensured that we built trust among different groups, maintaining the organization's reputation.

Dr. Brett Epperson



THE RESULTS

What Worked



Strong candidate pool



Singer buy-in



Transparent process



Successful transition



Artistic Director Designate period



Positive donor response

ASSOCIATION OF CALIFORNIA
SYMPHONY ORCHESTRAS

2026 ANNUAL CONFERENCE



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ASSOCIATION OF CALIFORNIA
SYMPHONY ORCHESTRAS

Empowering Our Music Community

HOSTED BY:

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SYMPHONY

Francesco Lecce-Chong

Music Director