Overview of Process

After a thorough review of past planning initiatives and the most recent planning strategies and tactics, the Planning Committee of the Board provided a summary of accomplishments from the past three year cycle:

Of the 5 Major Goals (or strategic areas of emphasis), 10 Objectives, 20 Strategies, and 73 Actions (or tactics), we completed 19 tactics, moved 38 tactics to the ongoing operational plan and have 16 tactics yet to be done. We have accomplished A LOT!

At a full Board retreat on April 24, 2021, participants celebrated our work and noted that there is more to be done:

<table>
<thead>
<tr>
<th>CELEBRATE!</th>
<th>Yet to be Done</th>
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<tbody>
<tr>
<td>• Proud that we held to our mission through a difficult year</td>
<td>• Address declining volunteer base</td>
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<td>• Our last concert had many major donors and 10% new people in attendance</td>
<td>• We are experiencing name/brand confusion between GLCO and GLCFA</td>
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<td>• Our leadership - Judy has done a remarkable job</td>
<td>• Day of Strings</td>
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<td>• Expanded educational offerings and community programming</td>
<td>• Organizational effectiveness/efficiency has not kept pace with</td>
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<td>• Nimble and creative in delivering on the mission during trying times</td>
<td>quality/depth of performances (need better internal processes)</td>
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<td>• Development of on-line programming</td>
<td>• Need to encourage/receive better input/involvement from</td>
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<td>• Consistent development or orchestra players</td>
<td>musicians</td>
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<td>• Expanded community partnerships, outreach</td>
<td>• Could have better communication overall</td>
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<td>• Enhanced financial performance and our “treasury department”</td>
<td>• Could achieve better cross-pollination between committees? Are</td>
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<td>• Resilient in the face of adversity</td>
<td>our committees all actively engaged? How do we know? Have we</td>
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<td>• New “brand”, office, website and SM outreach</td>
<td>evaluated effectiveness? How can we better share their results?</td>
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<td>• Wider range of grants and funding sources</td>
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<td>• European Tour</td>
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<td>• Messiah/Carnegie Hall/National Recognition</td>
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The Board also evaluated our current MISSION and VISION statements to be certain that they reflect current thinking and our changing environment.

Current Mission:

To produce professional live orchestral performances providing entertainment, education and inspiration for our northern Michigan communities.

Members expressed the following ideas relative to the mission:

- Is “live” before performances too restricting
- Needs to be clear, concise and crisp – memorable
- More community-based than stage-based
- Perhaps remove “providing”?
- Keep professional - but community-based
- Remove “produce”?
- Engender diversity in community

Based on comments recorded, the following is the board adopted mission:

To inspire, entertain and educate through live, professional, community-based orchestral programming.

Current VISION:

Great Lakes Chamber Orchestra envisions a culture in northern Michigan where everyone has an appreciation for orchestral and chamber music as a means to entertain, educate and inspire people of all ages while strengthening the communities in which they live.

Members expressed the following ideas relatives to the vision:

- Vision is inspirational and aspirational - expressing what we WILL be
- Need only one vision (not both internal and external)
- Are both “orchestral and chamber” descriptors necessary before music? Better way to express?
- Needs to be inclusive - diverse array of people and communities
• Needs to engender an appreciation among a broader community - challenging thinking about music
• Welcoming of a wide array of musical offerings - "out-of-the-box" thinking

Based on comments received, the following was approved:

**GLCO will build a culture of musical inclusion and diversity in Northern Michigan to encourage appreciation of orchestral music as a means to inspire, educate, entertain and enhance our communities.**

In past planning cycles, the process identified major goals (or areas of strategic emphasis) which are appropriate for use in future initiatives:

**GOAL #1:** Ensure the enduring financial growth and sustainability of GLCO and provide incremental funding consistent with the organization’s strategic direction.
**GOAL #2:** Strengthen GLCO’s infrastructure to achieve organizational and operational excellence
**GOAL #3:** Position GLCO as the professional resident chamber orchestra of northern Michigan and an invaluable resource that engages, enhances, and expands the cultural life for all people
**GOAL #4:** Build mutually beneficial and sustainable relationships
**GOAL #5:** Realize the potential of music to move the soul.

Simplified, these can be expressed as areas of strategic emphasis or foundations for planning:

• Financial growth and sustainability
• Organizational and operational excellence
• Culture of musical inclusion and diversity
• Sustainable and beneficial relationships
• Inspire, educate and entertain

The following represents the collective thinking of participants relative to the creation of strategies for the coming one to three years. Note that strategies are listed in the order that resulted from our multi-voting process, indicating relative priority.
## Strategies and Tactics/Updates

### 1. Develop and implement plan for consistent recruitment and retention of orchestra members, board, staff and volunteers.

**Tactics**
- a. Keep local focus in balance, especially with musician recruitment
- b. Develop and implement intentional “feeder orchestra” vehicles

**Updates:** Over the last few months, staff turnover has decreased. We feel we now have an excellent support staff. We have contracted with a new orchestra manager, and there is more communication with the musicians. The compensation for musicians is being studied and made more consistent. Information from the musician’s survey will also help with this process. Since the GLCFA has its own ushers, this has decreased the need for volunteers for that job. There is more work that needs to be done in this area. Dee Dee does reach out for help.

**Update:** February, 2022: It is felt that staff retention and recruitment has been improved and that we have a good stable staff. As part of this strategy and also the second strategy, described below, a two question musician survey was undertaken. Information gathered by the survey will help us with recruitment and retention of musicians. It was also essential to help us take a temperature of a critical part of our organization. Since the survey was completed several of the items raised have been address by hiring a new orchestra manager. Overall, I thought that the survey was quite positive. Not everything is going smoothly, and that is not too surprising. It is important for the board to respond to the musicians, tell them what we are doing, update them on the strategic plan.

### 2. Develop and implement strategic marketing plan and expand our audience base.

**Tactics**
- a. Expand newsletter to broader audience
- b. Use data mining to identify potential new audiences/participants
- c. Assess and implement vehicles for assessment of stakeholders: Board, musicians, staff, audiences, donors, general public, etc.
- d. Assess/develop travelling concerts
- e. Expand diversity of musical offerings and venues (live and other)

**Metrics**
- Increased audience base
- Increased donor participation ($)
- Improved satisfaction among stakeholders
- Increased number of social media participants & followers
- Increased educational program attendees
- Improved financial performance/return

**Lead Committee/Person**
Updates: The various tools to keep track of donors have been updated and communication with donors has increased in quantity and quality. We have conducted a survey of the musicians, there was excellent participation by the musicians. Plans need to be crafted to survey the other stakeholders. The quality and quantity of the financial information has also been grown. Little Bay Live was developed.

Update, February, 2022: The donor data we have has been worked on and improved. It is anticipated that the use of data mining will help identify potential new audiences/participants. This strategy also anticipates an assessment of stakeholders: Board, musicians, staff, audiences, donors, general public, etc. As mentioned above the musician survey is only one part of this. Other stakeholder groups need to be assessed. Using surveys where appropriate.

### 3. Improve operational effectiveness through budget alignment with processes and programs, “control management”.

Tactics:
- Work to design process and criteria for mission-based approval for all programming

| | • Improved profitability  
| | • Staff retention  
| | • Improved efficiency  
| | • Improved integration among committees, staff |

Updates: We are moving for establishing having accurate costs for each program. This should improve “profitability.”

**Update, February, 2022:** We are now in the process of preparing a budget for each concert or event. Communication is, as in many other areas, very important. We may not be able to “make money” on each concert, but by using a combination of ticket sales, sponsorships, and grants, we might break even, or become more sustainable. The Little Bay Concerts were an example of successful mini programs that were “profitable.” The new orchestra manager should help with this.

### 4. Maximize educational and other outreach initiatives and musician participation therein.

Tactics
- a.

| | • Increased parental participation  
| | • Increased number of younger participants |

Updates: Programming addressed to children and schools has been created and will be continued.
**5. Develop and implement long term fund development plan.**

**Tactics**

a. Assess partnership/utilization of community foundation vehicles for planned and other giving opportunities.
b. Use effective data mining with existing donor base to identify opportunities

- Increased donations
- Increased donors
- Bring back lapsed donors

**Updates:** Have decided to seek a full-time fund development person. With better data that has been developed and more competent staff this should help a new person create and implement a long-term fund development plan. What is our tactic for the use of Comp tickets?

Additional actions will be minimal until director is hired.