

Symphony Guild of Charlotte
Long Range Planning Committee
2016-2017

Members: Lisa Phillips/Linda Weisbruch, co-chairs; Devlin McNeil; Sallie Moody; Stephanie Stenglein
Ex Officio: Linda Borders, Mike Rutledge

Based on an extensive review of the Guild's challenges and strengths (attached), the Long-Range Planning Committee recommends the following actions for fiscal year 2017-2018:

1. Define the Charlotte Symphony relationship and re-examine reciprocal responsibilities
2. Build Guild consensus among members and board for our core mission
 - a. Examine allocation of resources (volunteer hours and monetary investment) against a mission-driven criterium
3. Improve the pipeline of leadership candidates – create a Volunteer Development team approach
4. Expand fundraising potential – reassess efficiencies realized with a Sponsorship Advisory team

Respectfully submitted,
Lisa Phillips Linda Weisbruch
Co-chairs

Attachment: Updated FADE Analysis 2013-14

2016-17 Long Range Planning Report

CHALLENGES WE FACE

Volunteer Coordination & Engagement

1. Member engagement lackluster, not all members volunteer
2. Need a more diverse stream of volunteers
3. Gap between new member orientation and connection to specific role
4. Chairs often fill their teams with friends, and are hesitant to reach out to an unknown volunteer
5. Gap between tech-savvy members and others, lowest common denominator often determines tech usage

Infrastructure

1. Volunteer time not directed to forging long-term strategies
2. Not all organizational documents are maintained on Guild PC and thus are not available to members
3. Volunteers don't always follow guidelines
4. Chairs do not always use the office admin and tech tools to full potential for project planning, documentation, etc.
5. Fear of change and utilizing new methodologies, so status quo will rule

Fundraisers

Kitchen Tour – leadership succession currently challenging

Overture – need to find ways to fill the seats on an annual basis

Leadership

1. Today's volunteer prefers shorter, episodic volunteer roles; many members desire to be in supporting positions and eschew leadership
2. Complexity of leadership positions, some require both strategic planning & day-to-day operations
3. Hard for working members to take on leadership roles in current day-oriented structure

Image

External perception is that we are not future-focused.

CSO

Need more joint strategic planning by SGC and CSO to maximize fundraising, marketing/PR, and education efforts.

RECOMMENDED STRATEGIES & SOLUTIONS

President & Executive Committee (VPs)

- Be inspiring – set clear goals, invoke passion, look forward.
- Make sure area goals feed into broader organizational & CSO goals.
- Change structure and frequency of board meetings; use consent agenda.
- Make membership meetings engaging & convenient, maybe repeat in different time/place to cover more members.
- Build effective teams – hold a Leadership-101 for committee leaders, use past leaders as mentors, and work along with Office Admin to:
 - a. Circulate Resource Index to ensure members know what resources are available & where they are.
 - b. Create leadership toolboxes and a process to help leaders with project planning.

- c. Ensure Admin involvement in project kick-offs, as well as setting master marketing plan & schedules.
 - d. Create a process to ensure that all committees report at the end of the year and submit final documents for file on SGC computer.
- Provide tech training & support via committee leaders, tech mentors, “Tech Moments” at meetings, and/or tech workshops.

Membership Team

- Develop a roadmap for the first year in the Guild with basic necessities such as schedule, directory, description of events/initiatives, etc.
- Beef up one-on-one connections – develop strategies to target key members leaders should get to know, assign point people to areas of the city or age groups, do a survey, connect with members who don’t go online or who miss meetings.
- Solidify process for connecting new members to VPs and actual volunteer roles.
- Update Mentorship guidelines to reflect new strategies for forging connections.
- Leverage different emotional connectors such as friendship or music by providing more opportunities to gather together. Invite all, not just new members.
- Step up volunteer recognition.

Fundraising Planning

- Prez-Elect to facilitate FR long range planning.
- Expand front-end coordination with CSO on planning events – type of event, demographic targets, timing, messaging, etc.
- Beef up project planning - strive for transparent communication within team, clearly articulate types of volunteer opportunities.
- Leverage our assets to attract event volunteers & leaders – smarts, work ethic, event experience.

Marketing Team

- Engage with VPs to develop & use a master marketing plan. Need point person in Marketing to draw out info from committees. Add media targets to the plan.
- Continue to embrace tech change & help our members adjust to it.
- Focus on presenting a modern image, capitalizing on the positives we have to offer.
- Add more coverage of our youth music initiatives.
- Make a plan for handling photos – store them for ease of use for social media, print, historical record.

Sponsorship Development

- Be strategic in use of fundraising database.
- Offer our donor perks (event tix, etc.) for use by CSO development and vice versa.
- Flesh out options for donors, such as direct support for scholarships.
- Explore out-of-the-box options such as opportunity to play with CSYO, etc.

Nominating

- Develop a formalized, multi-year strategic process for identifying & developing leaders.

Policy & Procedure

- Update titles of guidelines in order to present them in a fun way - Fun Facts, Fast Facts, How to Run a Crack Team, Event Planning for Dummies, etc. rather than Guidelines, Duties, Procedures, etc.

Treasurer, B&F

- Make financial reports more transparent and easier to understand.
- Incorporate a short prose overview to highlight cash on hand, performance against budget, etc.

Long Range Planning

- Visualize the future – our image, our name.
- Refine our relationship & communication channels with the CSO, including staff & board committees. Align with CSO 5-year plan.
- Reevaluate SGC's separate nonprofit status
- Consider narrowing the scope of the SGC's work
- Review and recommend changes to leadership structure to create a more realistic (shared) workload, ensure accountability, and strengthen the support system for our leaders.
- Create Volunteer Development Team to directly engage volunteers and, with Nominating, formalize a process for talent identification & cultivation. Use data from member profiles on new website to build a leadership database.
 - a. Consider creating a Volunteer Coordinator position within Membership committee to oversee/coordinate these activities
- Define how to include CSO family members & community leaders on our key committees.
- Explore:
 - a. collaborations with other groups.
 - b. new ways to get things done – interns, partnering of volunteers, etc.
 - c. creative ways to communicate with members – video, repeated satellite meetings, etc.