



# Chamber Music Raleigh Strategic Plan, 2021-2026

## Background

Chamber Music Raleigh (founded in 1941 as Raleigh Chamber Music Guild) has a rich history of presenting concerts and fostering the growth, development, and appreciation of chamber music in Greater Raleigh. In its upcoming 81st season of presenting the finest in regional, national, and international ensembles, the company will bring a variety of small ensemble listening experiences to as broad an audience as possible.

## Mission

The mission of the Chamber Music Raleigh is to enrich and connect individuals in the greater Raleigh community through intimate and exceptional chamber music experiences. The organization is committed to presenting world class artists performing music of the highest caliber, providing performance showcases for North Carolina artists, creating opportunities for intensive learning experiences and fostering a love for chamber music.

## Strategic Priorities and Goals, 2021-2026

The Board determined that there are four enduring strategic priorities that will guide the growth and development of the organization for the next five years.

<b>Artistic Product</b>	Continue to present the highest quality chamber music while diversifying and expanding our programming in order to grow our audience
<b>Educational Outreach</b>	Review, strengthen and systematize our strategy for reaching students and seniors in the community.
<b>Financial Sustainance</b>	To strengthen and diversify our funding sources to ensure a strong future for CMR
<b>Community Awareness</b>	To maximize our use of innovative and cost-effective strategies to increase exposure and build audiences.

As shown in the figure above, the strategic priorities include a continued commitment to presenting a high quality **Artistic Product**, strengthening **Educational Outreach**, building the **Financial Sustenance** of the organization, and cultivating **Community Awareness and Involvement**.

These priorities emerged from a strategic planning process in which board members participated in a pre-work survey, attended a retreat/work session and engaged in small group breakout sessions to continue strategic goal-setting. A SWOT Analysis was created and utilized to determine strategic priorities (see Appendix). We are grateful for the efforts of our Board Members who steered this process through their guidance, discussion, and feedback.

Making chamber music performed by the world's top artists available to everyone remains our central objective; we believe that these priorities will help direct our efforts as we identify our place within the evolving, post-pandemic community. CMR will focus on maximizing financial resources, developing strong community partnerships, continuing our master series and NC Artists Series programming and offerings, elevating outreach, engaging a broader audience, and forging new collaborative opportunities. The organization's mission will be unchanged: enriching and connecting individuals in the greater Raleigh community through intimate and exceptional chamber music experiences.

## Artistic Product

**Continue to present the highest quality chamber music while diversifying and expanding programming in order to grow our audience**

### Background

CMR recognizes that our challenge and greatest opportunity lies in making chamber music more accessible to a larger audience. In addition to *presenting* the series concerts, CMR is committed to *creating* opportunities for our communities' burgeoning chamber musicians. Our commitment to artistic excellence is realized through our NC Artists Series, Sights and Sounds, and Education and Outreach programs. These three areas also represent our focal points for the development of goals and initiatives expanded upon in this part of the strategic plan.

The 2021-2022 season features an array of wonderful programs in each of these three areas. Our Sights and Sounds program is very successful, well-attended and self-sustaining and our Youth Education and Outreach program is growing in very positive ways. Because both Sights and Sounds and the Youth Education and Outreach programs are solid, we have focused our planning efforts for the next three seasons on strengthening the North Carolina Artists Series, increasing the marketing effort and continuing to seek diversity through innovative programming. We believe that the initiatives presented here will support CMR's inevitable growth in our evolving community.

## Goals and Initiatives

### Sights and Sounds Series at NCMA

Continue to foster the growth of our Sights and Sounds Series in partnership with the North Carolina Museum of Art.

Note: Our partnership with the NC Museum of Art has a great deal to do with the success of the Sights and Sounds Series. There are numerous factors that contribute to this success: the hall is smaller and easier to fill, tickets are inexpensive, parking is accessible, there is an on-site dining option, and the artists performing are the same artists being presented by large market chamber music presenters such as Detroit, NYC and Los Angeles.

We will work more closely with applicants to help them integrate the NCMA permanent collection and special exhibits into their programs. Before submitting final proposals, applicants will consult with members of the committee and will be encouraged to include visual elements as part of their programs. In keeping with the overall evolution of CMR programming, the committee will solicit applications from small ensembles from a variety of musical traditions and genres.

### North Carolina Artists Series

Reorganize the series that features NC Artists to respond to trends in chamber music and ensure the continued viability of the concert series

Note: Classical chamber music audiences as well as funding from granting organizations are declining. Despite the fact that CMR's finances had decreased steadily between 2013-2018, the group continued to present six to eight concerts a year. We believe that restructuring our concert series will allow us to focus our resources on the concerts and the programs that make the greatest impact. The period from 2018 to 2021 (even with the pandemic shutdown) proved to rally an upswing in individual donors and grants for the company.

Note: Utilize the arts councils throughout the State to solicit proposals for this series.

### **Complete implementation of the 21-22 season avoiding flu season months**

Continue to identify block booking opportunities with other NC

presenters Continue to engage donors and appeal to grant funders

Example of series components:

- 3 headliner touring ensembles
- 1 emerging artist group
- 1 alternative style concert- this would likely be with another emerging artist group
  - "Alternative style" could mean the performance involves a merging of audiences (by including local artists or dancers like we'll be doing during our 14-15 season), or it could mean the venue is different from our standard and the performance takes place in an art gallery such as Contemporary Art Museum. Or "alternative style" could reference the genre of music performed.
- 1 partnership concert- We will remain open to the possibility of further developing our partnership with Four Seasons Chamber Music Festival and NCStateLive.
- Continue to produce the four-concert North Carolina Artists Series

## EXAMPLE SEASON STRUCTURE

- July - Sights & Sounds Concert
- August - NC Artists Concert
- September - Sights & Sounds Concert
- October - NC Artists Concert
- February - Sights & Sounds Concert
- March - NC Artists Concert
- April - Outdoors @ Cary's Ritter Park
- May - Sights & Sounds Concert
- June - NC Artists Concert
  
- Special Event - Collaboration or Special Venue Offering

SEASON 80 & 81 have followed this structure (through June 2023)

## Youth, Senior & Education Outreach

The growth of our Youth Education and Outreach program is both an important step in building and strengthening our organization and an important contribution to the development of our youth. Our objective is to continue to create opportunities for our community's budding chamber musicians.

Note: Making chamber music available to everyone remains our central objective. This season, through our expanding community outreach program, touring chamber musicians will perform in retirement centers and minority-populated schools to raise awareness of who we are and what we do. We hope this outreach will bring joy to all those who will be listening and perhaps create interest among individuals who have not yet been exposed to the wonders of chamber music.

Continue to host an annual Youth Chamber Recital for intermediate-level students.

Continue to strengthen and expand our education program in order to have a significant impact on the youth in our community in the 82nd, 83rd and 84th seasons.

- Continue to foster performance opportunities for NCCMI student groups.
- Continue to negotiate and include a fee for educational outreach and Master Classes in all CMR artist contracts.

Develop a Chamber Music Appreciation course to be implemented in 82nd season

- Determine leaders/artists: Performers will be drawn from current as well as past board members
- Choose a venue
- Choose class format
- Determine our target audience

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## Responsibilities

We have outlined the structure of our next five seasons. It can now be up to the programming committee, led by Steve Reynolds, to make recommendations to the Executive Committee about the specific groups to bring hire.

The Executive Director will continue to work with other presenters and artist management to compile the roster of available artists for the programming committee to consider. When possible, block booking opportunities will be utilized to save money and present the highest quality ensembles.

# Infrastructure

**Review, strengthen and systematize our infrastructure to support the inevitable growth and success of CMR**

## Background

RCMG has experienced a number of transitions in the last few years. The impact of these transitions has brought our attention to a number of infrastructure issues that need to be addressed. Our areas of concentration include the clarification of roles and responsibilities, refinement of communication channels, examination of processes and procedures, discussion of board responsibilities, and review of our bylaws. We are optimistic that fostering a strong infrastructure will support the inevitable growth of our organization.

## Goals and Initiatives

### Roles and Responsibilities

Clarify roles and responsibilities to ensure that all tasks/duties are understood and implemented

- Board
  - Draft a list of Board member responsibilities and accountabilities (draft complete)
  - Assimilate the results of these discussions into a “Board Member Pledge”, accessible in Google Drive, to be reviewed and signed by each Board member (draft complete)
  - Review drafted document with Board members, approve “Board Member Pledge”
  
- Committee
  - Review and expand existing descriptions (draft complete)
  - Outline the roles and responsibilities of committee chairs (draft complete)
  - Disseminate roles and responsibilities and articulate expectations to committees (Committee Chairs, each fall)
  - Review bylaws to ensure that any changes that have been approved by the Board are indicated in the bylaws (Executive Committee as needed)
  
- Executive Director
  - Expand on the existing job description and list responsibilities (draft complete)

- Review said job description and responsibilities with Executive Director (members of the Executive Committee)
- Establish a calendar listing goals, timelines and deliverables for the year (create in 2022-2023- Executive Director, Treasurer, Marketing Chair and President)

## Communication

Improve systems of two-way communication to enhance relationships, ensure support and create opportunity for ongoing feedback

- Executive Status Report
  - ED will issue a brief status report bi-weekly to the Executive Committee members which will include:
    - accomplishments for the last two weeks
    - objectives for the next two weeks
    - potential problems delaying an accomplishment or objective
  - The Executive Committee and Committee Chairs will communicate with the ED.

## Processes and Procedures

Review and establish processes and procedures to strengthen operations

- Evaluation/Assessment: Evaluate and assess new and existing initiatives on an annual basis (Board President, Jan-April of each year)
- Organizational Calendar: Establish and review annually an Organizational Calendar that identifies and secures House Concert Series dates and sponsorships, educational concert dates, etc. for the next season (Board President, April-June of each year)
- Strategic Plan Progress: Establish a process for ongoing review of strategic plan (review at Executive Committee meetings and provide a semi-annual report of progress to the Board) (Board President)
- Executive Director Performance Review Procedure: Establish a regular review process to provide performance feedback to ED to ensure two-way communication about performance strengths and areas needing improvement
  - *The Board President and selected Executive Committee members will meet with the ED for an annual performance review and mid-year performance review and more frequently to follow-up on the reviews as needed.*
  - A document following a review will be written, reviewed, and signed by all individuals who participated in the review and the follow-up
  - A copy of all performance documents will be placed in the Executive Director's personnel file
  - The Executive Committee has decision making authority regarding the employment of paid staff

## Board Development

## Enhance processes for ensuring that Board members are able to contribute to the support of the CMR mission

- Board Recruitment/Composition: Establish a process for the recruitment and review of Board members
  - Establish that the Executive Committee will serve as the Nominating Committee and meet each March/April
  - Ensure that Board members are meeting their responsibilities as set forth in the “Board Member Pledge.”
    - If current board members are not fulfilling their fiduciary duties, the President will ask that they resign.
  - Establish a vision for board composition ensuring that we attract individuals who have the skills, talents and expertise that CMR needs to grow and be successful (Executive Committee)
- Update the board orientation Google folder that assimilates critical documents for Board members. (President, every summer to be sent out with July 1 Welcome Letter)
  - As of July 1, 2021, we have this Google folder which consists of:
    - Committee Assignments
    - Board roster
    - Operations calendar with all meetings and events
    - Committee descriptions
    - July 1st welcome letter from the President
    - CMR Concert Schedule
    - CMR Mission statement
    - 3-page Guild history document
    - Create and add 1 page annual calendar including all deadlines-
  - Establish a process for ensuring that Board members have access to and have reviewed the Orientation Google folder (Executive Director, handout all documents at first board meeting of each term)
  - Review contents and establish expectations (President, annually at the first board meeting of the season)

The Executive Director or Board President is responsible for updating these documents each spring for email distribution each year on July 1.

## Bylaws

### Establish a review process that ensures bylaws are up to date

- Review CMR bylaws
  - The Board President works with the Executive Committee so that an amendment, if necessary, is completed by January 2023.



# Financial Sustenance

To strengthen and diversify our funding sources  
to ensure a strong future for Chamber Music Raleigh

## Background

Recent years have witnessed erosion in concert attendance as well as constrained funding from government and philanthropic organizations. While CMR's budget reflects the downward trend, the organization has nonetheless remained committed to innovative, high-quality programming that is accessible to all. To maintain this commitment, CMR must enhance its financial positioning with resonant messaging to all its revenue sources: individual donors, corporate sponsors, granting agencies, and cultural arts consumers. In 2022-2023, the organization will articulate its appeal to each target with concise, compelling and systematic outreach based on CMR's unique value proposition.

## Goals and Initiatives

### Donor Support

Increase financial support through systematic appeals, improved communications and special event (house) concerts

- Examine and potentially re-define individual contribution levels
- Make giving simple (Finance and Development Committee)
  - Sharpen and modernize overall fundraising messaging
  - Planned Giving (i.e., estate planning, living trusts, etc.)
    - Research relevant best practices
    - Develop informational materials
  - Monthly Giving: "CMR Sustainers" – automatic bank debit plans
  - Donor Challenge – seek a matching donor each year
- Endowment Appeal – articulate value: "Why Give?" (Lawrence Bivins in cooperation with Finance and Development committee members)
- Develop concise, compelling messages for each appeal and segment
- Related Initiative: House concerts
  - Complement annual high-dollar "House" concert with one lower-price concert (President- see Artistic Product Section of strategic plan for details, timeline and deliverables)

### Deliverables

- Creation of Committee on Finance and Development
- Revise and enhance “Giving” section for inclusion in 2022-2023
- Prepare rotating scripts for pre-concert remarks
- Research and develop planned giving program (Finance and Development Committee Chair in cooperation with F&D committee members)

### Responsibility

Peg O'Connell; Finance and Development Chair and Committee members; Marketing Committee; Executive Committee

## Grant Support

### Maximize value of grant resources

#### Deliverables

- Evaluate and re-prioritize list of available grant programs
- Weigh the following factors: financial benefits; direct and indirect costs; probability of success

#### Responsibility

Executive Director in cooperation with the Treasurer and Executive Committee (annually in early summer)

### Evaluate grant proposals for the 2022-2023 Year

- Outline strategies for enhancing submissions for the next year

#### Deliverables

- Review past grant feedback received (Executive Committee and Executive Director each January and July)
- Propose strategies for improvement (Executive Director to Executive Committee each January and July)

#### Responsibility

Executive Director in cooperation with the Treasurer and Executive Committee

## Support from the Business Community

### Forge value-added relationships with corporate givers

- Develop strategy for harnessing business community
- Seek input from potential business donors/sponsors on their interests, expectations, and

giving criteria

- Develop messaging for corporate outreach and a value proposition (e.g., “support the careers of emerging young musicians”; “invest in a vibrant arts economy for Greater Raleigh”)
- Determine and list benefits of sponsorship (e.g., program ad, tickets, logo on CMR website; recognition in pre-concert remarks)
- Identify targets
- Determine tactical process for making the pitch
  
- Recruit corporate leaders to board

### Deliverable

- Secure one corporate concert sponsor for 2022-2023
- Add one corporate sponsor per season

### Responsibility

Bobby Young and Finance and Development Committee Chair in cooperation with members of the Finance and Development committee and the Executive Committee and Full Board (ongoing)

## Earned Income

### Improve ticket-related revenue streams

- Evaluate ticketing prices and policies (Spring 2014)
  - Resolve handling of sales tax
  - Consider replacing Flex tickets with an “exchange” program
  - Price season ticket discount as percentage
  - Consider reserved seats
  - Senior citizens ticket price
  - Group ticket packages
  - Evaluate adding a processing fee
  - Deploy social media

### Deliverable

- Partial revision of ticketing strategy in advance of next season
- Work with Four Seasons & NCState Live
- Propose other changes in time for 2023-2024 season

### Responsibility

Executive Director in cooperation with the Treasurer and the Executive Committee

# Community Awareness and Involvement

**To maximize our use of innovative and cost effective strategies  
in order to increase exposure to and build enthusiasm  
for the mission of Chamber Music Raleigh**

## Background

The organization clearly has a core group of loyal audience members and donors who have consistently supported our programming for years. We recognize, however, that there is a need to engage a larger cross-section of our community. We are exploring how to identify our place within our evolving community and how to best engage new audience members without alienating our long time supporters. Making chamber music available to everyone remains a central objective. Our goals and initiatives focus on building relationships and getting the word out about our organization and what we do.

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## Goals and Initiatives

### Building Relationships

Develop comprehensive ongoing strategy for building meaningful relationships with our supporters to ensure that they experience an enriching and delightful experience through chamber music

- Develop a strategy that complements the work in process by our artistic product leaders (Jason Pace and Stephen Fortlouis in collaboration with Marketing and Hospitality Committees)
- Determine target audiences
  - Concert Attendees
  - Major senior living communities
  - Music teachers
  - Educational institutions
- Determine messaging

### Get the Word Out

## Create and implement a marketing plan to ensure that we are maximizing our efforts to bring chamber music to the greater Raleigh area

- Research and identify groups of potential audience members
- Create/manage a calendar for all publicity deadlines
- Administer focus groups for collecting market information
- Identify media channels, creating a cost schedule and budget for publicity
- Update the distribution network for publicity
- Build electronic distribution networks for digital media (email, facebook, twitter, website)
- Utilize audiences and board to grow performance attendance and financial support through incentives and connections (President, Vice-President and Marketing Chair)
- Identify and follow through with co-marketing opportunities with peer organizations (Duke Performs, NC Symphony, Carolina Performing Arts, Malarmé, Four Seasons) (Marketing Chair, ongoing)

## Responsibilities

Marketing Chair in cooperation with Marketing Committee members

### CURRENT GRANT SUPPORT INCLUDES



### CURRENT CORPORATE SUPPORT INCLUDES



## Addendum: Confidential SWOT Analysis

<p style="text-align: center;"><b>Strengths</b></p> <p style="text-align: center;"><b>Programming</b></p> <p>CMR is dedicated to performance excellence and high quality programming. This is reinforced through the organization's</p>	<p style="text-align: center;"><b>Weaknesses</b></p> <p style="text-align: center;"><b>Financial Viability</b></p> <p>Financial viability was noted as a key concern. Board members note the changing landscape with regard to arts funding in</p>
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<p>choice of professional venues and artists. The <u>Sights and Sounds Series</u>, offered in partnership with North Carolina Museum of Art, received the most comments relative to strength in programming. Many noted that it is a strong example of a diversified, artistic program that draws a broad spectrum of people from our region. The CMR <u>Masters Series</u> and <u>youth programs</u> (providing master class opportunities for the next generation of musicians) were also noted as strengths, although with less frequency than the Sights and Sounds program.</p> <p style="text-align: center;"><b>Market Potential</b></p> <p>CMR is well-positioned within a growing and well-educated community containing a small but very dedicated group of committed supporters who love chamber music and want others to love it too.</p> <p style="text-align: center;"><b>Leadership/Board</b></p> <p>CMR has a knowledgeable and committed executive committee and board. There is a strong sense of teamwork, a solid financial commitment and optimism.</p> <ul style="list-style-type: none"> <li>• Knowledgeable &amp; talented staff</li> <li>• Partnership with North Carolina Museum of Art</li> <li>• Reputation as a presenter</li> <li>• Growing support from grantmaking organizations</li> </ul>	<p>combination with the cost of presenting top quality artists. Many noted the need for creative/strategic thinking and goal-setting in this area – especially with regard to private fundraising, cultivation of donors and grant applications. Specific ideas included adding more house concerts with low overhead and project-focused grants.</p> <p style="text-align: center;"><b>Marketing/Publicity</b></p> <p>Board members noted that they would like to see more extensive, targeted marketing/ publicity but also recognized funding constraints in this area. There was a call for fresh branding to attract a broader audience and more publicity for concerts.</p> <p style="text-align: center;"><b>Post-COVID Box Office Sales</b></p> <p>Although CMR was one of the first triangle arts groups to resume programming, the attendance has not returned to pre-pandemic averages. The company continues to professionally-film the concerts for a one-week, free webcast in the winter months.</p> <p style="text-align: center;"><b>Adjusting to Change</b></p> <p>Board members noted a fear of change as a potential obstacle to organizational sustenance. Specific comments noted the need for the CMR to seek more partnerships with other nonprofits and to continue to explore innovative programming.</p>
<p style="text-align: center;"><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>• <b>Calendar coordination with other organizations</b></li> <li>• <b>Programming innovations</b></li> <li>• <b>Friend-raising/cultivation</b></li> <li>• <b>Effective advertising</b></li> <li>• <b>Strengthen partnerships - finding new ones</b></li> <li>• <b>Finding/reaching diverse audiences</b></li> <li>• <b>Board development &amp; planning - engage past board members</b></li> <li>• <b>Younger audience cultivation - student performances</b></li> </ul>	<p style="text-align: center;"><b>Threats</b></p> <p style="text-align: center;"><b>Competition for funding</b></p> <p style="text-align: center;"><b>Competition for audience from other arts organizations</b></p> <p style="text-align: center;"><b>Changing landscape for chamber music</b></p> <p style="text-align: center;"><b>Changing landscape for arts funding</b></p> <p style="text-align: center;"><b>Loss of venue partnership with NCMA</b></p> <p style="text-align: center;"><b>Shrinking audience</b></p>

*Note: This plan is draft that has not been fully adopted by CMR's Board of Directors.*