



STRATEGIC PLAN

SEPTEMBER 2019 through AUGUST 2022

Drafted by AFCM Strategic Planning Committee

Leslie Tolbert (AFCM Board Member), Chair

Paul Kaestle (AFCM Vice President)

Elaine Rousseau (AFCM Board Member)

Paul St. John (AFCM Board Member)

Joseph Tolliver (AFCM Program Secretary)

Cathy Anderson (AFCM Operations Manager)

Approved by vote of the AFCM Board on September 25, 2019

MISSION

The Arizona Friends of Chamber Music (AFCM), founded more than seven decades ago, promotes classical and contemporary chamber music in Southern Arizona. AFCM's overarching goal is to help chamber music, with its special focus on delicate conversations among instruments, to thrive here. AFCM aims to develop and maintain a broad-based, sustainable audience for our concerts through creative programming, and to reach out to an ever more diverse audience through our commissioning program, our formal and informal community outreach activities, and our educational offerings.

- AFCM *presents* performances of chamber music by world-class musicians from around the globe in an intimate concert hall. The same groups that perform in Paris, London, and New York perform for AFCM's Southern Arizona audiences.
- AFCM *enhances* the modern chamber music repertoire by commissioning new pieces from emerging and established composers. AFCM has one of the strongest commissioning programs in the country.
- AFCM *broadens* the appreciation of chamber music with innovative performances that incorporate contemporary chamber pieces, up-and-coming musicians, and new formats in unconventional venues.
- AFCM *educates* audiences, from chamber music enthusiasts to those new to chamber music. From pre-concert interviews with performers to master classes for local musicians to performances at local elementary schools, ongoing education is key.

As stewards of the organization, AFCM's Board of Directors is enthusiastic about our mission and mindful of the urgent need to closely align costs and revenues as we plan AFCM's next three years.

HISTORY & GOVERNANCE

In the aftermath of World War II, a few friends in Tucson occasionally got together to talk about politics and listen to the latest 78-rpm records. Live musicians began joining the mix, political discussions diminished, and their gathering spots and schedules grew increasingly regular. In 1948 they formally established a non-profit entity offering music to a growing audience of enthusiasts, and that group would eventually morph into today's internationally recognized Arizona Friends of Chamber Music.

Led by an all-volunteer Board of Directors, AFCM today has but one full-time employee, our Operations Manager, charged with managing ticket sales and a host of other tasks vital to our success. The Board functions through numerous committees, each dealing with a specific aspect of AFCM's core missions. The full Board of 22 members meets formally on a regular basis throughout the year, and often less formally through smaller gatherings and electronic means.

STRATEGIC CHALLENGES

AFCM is a key component of Southern Arizona's classical music environment, helping to make Tucson a vibrant hub for the arts. Yet, although we have a stalwart core of devoted concertgoers, we must address some serious challenges. Our net income is falling, year over year, as we are subject to shifting economic and demographic trends and uncertainties. In the coming years, we must be mindful of this trend and do a better job of aligning our costs with our revenues.

We can learn from the results of a survey conducted in 2019 by our communication design agency, Openform, of a sampling of AFCM's present audience. From our 2,545 listserv addressees, Openform received 278 responses. Impressions of AFCM from this limited sample were generally positive, especially regarding the quality of our music selections and musicians. Major messages for us include:

- Our communications, graphics, and printed programs are generally excellent.
- The AFCM Operations Manager, Cathy Anderson, deserves high praise.
- Ticket prices and concert schedules are generally viewed to be appropriate.
- Our Winter Festival is a critical success, but needs some tweaking.
- The majority of audience members prefer the classics over newer music.
- Neither our Now Music series nor our unusual venues were very popular.
- KUAT-FM radio spots reach our target audience; social media and the Arizona Daily Star are not as effective.

Our most significant challenge is that overall attendance at our concerts is gradually declining. As with most chamber music associations, our members are predominantly (79%) over 65 years of age (2019 Openform report). As older members stop attending concerts, they are not automatically being replaced by a younger cohort. Once long, there has been no waiting list for season tickets for many years, and a simple season-subscription model can no longer be relied upon for attendance stability. Sales of individual tickets have risen, but not enough to replace the season-ticket holders we have lost. For these reasons, even as we continue to try to maintain and even increase the loyalty of our core audience, we also must try to appeal to a modestly younger audience. Those aged 55-65 might be attracted by more innovative forms of chamber music.

Recent website improvements coupled with more elegant design of marketing materials have helped to modernize AFCM's image—probably explaining why we now have 2545 people on our listserv. However, so far, these efforts are mostly preaching to the already converted. **We must seek more people with an interest in chamber music and encourage them to join the AFCM listserv,** which will keep them up to date with the range of opportunities we offer.

We can change aspects of our programming while keeping successful aspects intact. Our core Evening Series continues to be mostly successful, and the annual Winter Festival is considered a "gem," so we would not plan to change them significantly. The experimental

Now Music series has opened some new doors, especially to people who are *not* already aficionados of chamber music, and we should use what we have learned from it to consider some significant changes for upcoming seasons. As a whole, it appears to have been confusing to many potential attendees, so we should consider breaking it into two or three separate clusters of events, as outlined in the next section. The new summer concerts appear to be a good way to maintain year-round connections with our AFCM audience, so we propose to continue them.

We must mount more targeted fund-raising efforts. The 85718 Foothills zip code accounts for the largest percentage (20%) of AFCM's members. Foothills zip code 85750 accounts for another 5% of our membership. Targeting these zip codes, especially, for fund raisers would be a smart strategy to increase financial donations to AFCM and even to grow our membership.

We should change our ticket offerings. For example, since subscriptions to our regular evening concerts are down and single-concert ticket sales are up, we could offer discounts for multiple-ticket sales for smaller collections of concerts than full-season purchases (such as five concerts for the price of four). The same may be true for the Festival, where discounts for the purchase of three or four rather than five tickets might stimulate sales.

External funding is constantly changing. Funding from traditional sources such as the Arizona Commission on the Arts and the Arts Foundation for Tucson and Southern Arizona vacillates, and businesses are increasingly reluctant to invest in the arts without obvious direct return. In fact, businesses are more likely to place paid ads in our programs than to make outright donations. As we continue to cultivate existing sources of funding, we also must continue to seek new sources.

The Leo Rich Theater, used for our major concert series, is in need of significant renovation. As the major entity using Leo Rich, AFCM should not just monitor, but participate actively in, conversations with City planners. By building a strong relationship with the City of Tucson and the Rio Nuevo Board, we will be able to describe and endorse useful upgrades and plan around disruptions that will result from implementation of desired upgrades. A member of the AFCM Board should represent our interests in planning discussions.

Our educational offerings are strong, but the Master Class series attracts too few participants and needs extra attention; it may simply need better publicity. The Music in the Schools program is thriving and continually strives to ensure that we are reaching the underserved student populations we especially want to reach.

What are *not* areas of concern for AFCM are the core programming, the quality of musicians eager to perform here, and the excellence of performances. These must be maintained even as we make changes to address the concerns outlined above.

MEETING THE CHALLENGES

Artistic Programs

In the coming seasons, AFCM must continue to reach out to new audience members, without alienating the large core of current supporters. Thus, the strategic plan calls for maintaining the current artistic direction in the Evening Series and the Festival, while pushing harder to succeed with some of our newer initiatives.

MAIN CONCERT SERIES

Wednesday Evening Series. Our trademark collection of concerts, this series brings to Tucson the best of the best ensembles from around the globe. The series consistently meets the demands of the most discriminating and knowledgeable chamber music aficionados and delights more general classical music enthusiasts and others interested in chamber music in its purest form. We enjoy broadening the experience of our core audience by weaving contemporary music and presentation into our core programming. We will continue this series, presenting these concerts at the Leo Rich Theater. We also will continue to provide high-quality printed programs, including Nancy Monsman's excellent program notes for each concert. In addition, we will consider posting programs and notes online in advance of each concert, whenever possible.

Tucson Winter Chamber Music Festival. Each year, we host a cast of musicians from around the globe for an intensive week of collaboration and performance not seen at any other time during the season. Master classes, lectures, open rehearsals, a Gala Dinner, and afternoon and evening concerts, with opportunities to meet the musicians and occasional composers, make for a week of chamber music joy. We will continue to emphasize top-rank internationally recognized artists and mixtures of instruments that allow performance of works that are heard much less often than string quartets and trios, and will continue to present these concerts at the Leo Rich Theater. Because of significant public demand, whenever possible program notes for the entire Festival will be posted online in advance.

We should maintain the current length of the Festival and number of performances, but try to increase revenues by providing more flexibility for our audience, offering discounts for three or four rather than five performances. Greater flexibility should result in more people in total attending the five performances.

Efforts to draw audience members from afar have not been successful, but could be continued, for instance, with a more focused effort on the pilot project run in 2018-19 – trying to draw members of the Seattle Chamber Music Society to our Festival.

Piano and Friends. We will consider reinstating the Piano and Friends series, to meet the interests of our loyal audience, possibly in a smaller venue. Young artists entering the national/international scene will continue to be featured. A pianist will always be included and another artist may be added for an ensemble presentation. Master classes on Saturday

preceding the Sunday concert should continue. AFCM is proud to have presented Lang Lang in this series as a young artist before he became world renowned.

Summer Concert Series. Starting in the summer of 2016, AFCM has sponsored a series of three concerts, one each in June, July, and August. These popular concerts, performed in Holsclaw Hall at the University of Arizona, feature performances by local artists, along with wine and hors d'oeuvres. Concerts have been sold out, indicating audience enthusiasm for chamber music during the hot Tucson summer. We will continue this concert series.

Commissioning Program. Since 1997, AFCM has spearheaded more than 70 commissioning projects, leading the Miró Quartet to declare the program “a real gem in our American cultural scene.” With sponsorships from audience members, we will continue to commission two or three new works per season from internationally renowned composers, to be premiered in one of AFCM’s concert series. We will better publicize to our audience members opportunities to sponsor commissions, and we will explore opportunities to partner with an organization such as the American Composers Forum, or to obtain grants from public and private institutions (such as the National Endowment for the Arts) to be matched by local sponsors.

NEW INNOVATIVE AND EXPERIMENTAL PROGRAMS

In a new, innovative series of performances, outside-the-box presentations blending art genres that may include film, dance, and digital or photographic projections will be featured as chamber musicians present classic, contemporary, or newly commissioned music in novel ways. Inventive combinations of avant-garde, experimental music will be included in this classical crossover series. Concerts, which we expect will be enticing to both chamber-music aficionados and novices, our loyal audiences as well as a younger cohort, will be presented in a variety of venues as appropriate for each particular performance.

In coming years, AFCM will add other distinctive chamber performances in unusual venues, sometimes before quite small audiences. Our initial forays into this concept in 2018-19— an intimate private-home piano concert for just 40 guests that sold out in less than 24 hours, and a chamber group bringing Haydn and Beethoven into a local brewery to entertain a packed house — were quite successful, demonstrating a solid public interest in such events.

As new programs like these are proposed for consideration, the AFCM Board will carefully evaluate costs versus benefits and goodness of fit with AFCM goals. Once approved, each new program’s effectiveness will be reviewed annually before receiving further AFCM financial support.

Programs of Collaboration and Community Outreach

In addition to presenting concerts, AFCM works hard to ensure that chamber music thrives in Southern Arizona and reaches a broad and diverse audience through a variety of outreach programs and initiatives.

Music in the Schools. This program organizes and supports concerts for children in local schools, especially those in economically disadvantaged areas. We will continue this program and will try to expand the number of AFCM-audience donors who sponsor these concerts. We will consider additional crowdfunding drives for this program.

Tucson Desert Song Festival. AFCM has for several years participated in the Tucson Desert Song Festival, presenting young professional singers from Ravinia's Steans Music Institute or other suitable artists, to the mutual agreement of AFCM and TDSF (which has provided AFCM with a performer subsidy). These concerts have drawn enthusiastic attendees from outside our normal audiences, and we will endeavor to draw those people into our own loyal AFCM audience with greater frequency.

Tucson Adult Chamber Players. The Tucson Adult Chamber Players program – recently organized by a member of the AFCM Board with financial support from AFCM – brings together Southern Arizona amateur musicians of differing skill levels to build musical communities, provide learning opportunities, and bring the joy and passion of chamber music into daily life. The program is so popular that all openings have been filled. We will continue this program, with annual review for reapproval by the Board.

Master Classes. AFCM has for several years organized Master Classes for local musicians, typically during our Winter Chamber Music Festival and with each Piano and Friends concert. The master musicians consistently offer budding musicians tremendous learning opportunities, but participation by local musicians has often been marginal. We will redouble efforts to draw more local music students (University of Arizona, Pima Community College, high schools) to our master classes.

Tucson Junior Strings. For several consecutive summers, AFCM has financially supported Chamber Music in the Mountains, a program under the umbrella of Tucson Junior Strings, bringing together scores of young musicians for a full week of intensive rehearsal at a Mt. Lemmon camp, followed by a public concert. We intend to continue our support of these up-and-coming local chamber music students at a similar level in the coming years, with annual review.

Publications and Marketing

Selling tickets is likely to be increasingly challenging in the next few years. Decades ago, competition was limited, multiple newspapers provided ample publicity, and we even had waiting lists. But today, Tucson enjoys numerous music venues, each with its own loyal audience. Thus our marketing and publicity efforts must be increasingly focused, smart,

and innovative, aimed at keeping our loyal audience as well as attracting new, and younger, audience members. We will enthusiastically pursue multiple avenues:

- Expand the use of our listserv. Emails will not just announce regular concerts or supper club gatherings, but also promote more events outside our regular series, such as performances by the Tucson Adult Chamber Players. Patrons will be urged to sign up for our emails.
- Grow our social media base. We now have approximately 1,700 total followers on Facebook, Twitter and Instagram, with more every week. Future posts will increasingly feature stories written to meet varied levels of interest in AFCM, *e.g.*, about the lives and careers of our musicians and commissioned composers, and diverse local and national music-related events.
- Expand press relationships. We will seek ever-wider traditional press coverage of individual events, as well as AFCM in general, through such public relations methods as media news releases and interview suggestions. We also will continue our renewed effort to gain free listings and publicity through a range of online and print publications.
- Give extra support to innovative programming. Private-home salon performances and other more intimate and unusual concert concepts will receive extra attention, whether offered at normal ticket prices or at targeted fund-raising levels.
- Consider adding material to printed programs. A section titled “From the Board” would focus on issues the board is considering or planning, asking for feedback where that would be useful.
- Explore more outside coordination. Our successful link with the Tucson Desert Song Festival shows how mutual promotions with other music-performance entities can provide added benefits.
- Work with our marketing firm, Openform, to expand the reach of our appeal.

Financial Support

The strong financial health of AFCM, both short- and long-term, remains essential to the success of our entire program. We have been fortunate since our inception to enjoy revenues from a variety of sources sufficient to support all that we have chosen to do. We recognize, however, that whenever income is projected to diminish, either our programming plans must follow suit or new revenue must be raised.

During the last five years the trend, size and the volatility of several AFCM accounts changed dramatically. Legacy giving became an important element of our overall contributions (\$380K over 5 years), but with a huge variation from year to year. Investment income also has been uneven (varying almost \$200K from our worst year to our best). The structure of our costs changed significantly as most of the work in marketing and communications was shifted from volunteer board members to outside professionals (about \$50K/year). The cost of hiring musicians also increased (about \$40K) as we added several new projects (Now Music, Summer concerts, and Tucson Adult Chamber Players). The net outcome of all these variations in income and expenses has been a decline in our overall financial situation. Net income was significantly negative for the last two years, resulting in a decline of about \$100K in invested assets over the last 5 years (compared to an increase of about \$500K in the previous 5 years).

Going forward, losses in net income are likely to increase over the next two years due to the three added Evening Series concerts each year and the maintenance of all of the other programs now underway. In addition, over the three-year planning horizon, we are very likely to experience a national recession. Assuming that the impact of the recession will be significant, our projection for the next three years shows a decline in net income of about \$400K, leaving invested capital of about \$800K.

To increase our net operating income over the coming years, every aspect of revenue generation and cost reduction must be explored. We will aggressively seek grants from relevant government and private institutions; create new/original sponsorship concepts supporting concerts, musicians, and commissions; and work to expand interest in our legacy and planned-giving programs. Most importantly, we should plan to undertake a professionally assisted capital campaign when the national economic scene appears to be most auspicious.

Long-Range Planning and Evaluation

Progress toward the goals and objectives set out in this three-year strategic plan will be monitored informally by the Executive Committee throughout each year, but evaluated formally by the Board and revised as deemed necessary at the end of each concert season.

For the full Board's final (spring) meeting of each concert season, the committee chairs, Operations Manager, and members of the Executive Committee will provide statistics regarding the past season's activities (attendance, revenues and expenses, and fundraising levels, including comparison with equivalent figures for past two years). The Board will analyze progress toward Strategic Plan goals and decide whether the Strategic Plan for the coming year should be revised in light of the previous year's experience. If changes in the Plan for the coming year are recommended, the Finance Committee will develop a report of the estimated costs of implementing new elements of the plan and provide revised line-item budget projections covering both income and expenses for the upcoming two fiscal years.

APPENDIX

Brief Descriptions of AFCM Standing Committees

(NOTE: The detailed policies and procedures for all committees are described in a separate document entitled “Policies and Procedures of AFCM Committees.”)

Artistic Committee

The Artistic Committee, in consultation with the Marketing and Finance Committees, leads the AFCM board on the artistic policies, planning, and programming of AFCM concerts, ensuring that the music program meets the preferences of its targeted audience(s) and delivers music of the highest standards within a program that is financially viable. The committee normally is chaired by the Program Secretary of AFCM and comprises the director of each of AFCM’s concert series, the chair of the Commissioning Committee, and the Festival coordinator; the committee may also include additional members of the AFCM Board of Directors. Decisions of the Artistic Committee that require the commitment of AFCM resources require prior approval by the AFCM Board.

Commissioning Committee

The Commissioning Committee—with input from sponsors, performers, and others—evaluates, selects, and negotiates and contracts with composers for the commissioning of works to be premiered at AFCM’s concerts. The committee coordinates between the composer, the musicians, and the artistic director of the relevant AFCM series (e.g., Evening Series, Festival) concerning details of instrumentation, length, etc. The committee also plays a leading role in obtaining sponsorships for commissions.

Educational Outreach

AFCM’s robust educational outreach efforts include: a) the Music in the Schools program, in which professional Tucson musicians each year reach over 3,000 local schoolchildren in performances in their schools; b) the Winter Festival Youth Concert, which fills Leo Rich Theater each year for a concert by Festival musicians for school children; c) master classes given in conjunction with the Festival and the Piano & Friends series. Each of these programs is overseen by a different AFCM board member; and d) the Tucson Adult Chamber Players coaching sessions for local amateurs.

Executive Committee

The Executive Committee, composed of the president, vice-president, treasurer, and three other Board members, takes the lead in implementing AFCM's current Strategic Plan. It is authorized to act for the whole Board on all decisions that require Board approval, except for the hiring and replacement of the Operations Manager, the artistic director of the Festival, and major consultants and contractors, all of which require approval of the full Board. The committee regularly reviews the financial status of the organization and works with other AFCM committees, as appropriate, to propose and enact changes to AFCM's operations in order to ensure AFCM's financial viability. The committee also will evaluate Board effectiveness each year and develop a rational recruitment and succession plan, ensuring that Board membership continually evolves to meet the changing needs of the organization.

Festival Committee

The Festival Committee is responsible for all aspects of the Tucson Winter Chamber Music Festival, including but not limited to selection of dates and musicians (in communication with the Festival artistic director), venue personnel and logistics, special marketing and celebrations, support for and payment of musicians, and arrangements for the youth concert, master classes, and open rehearsals.

Finance Committee

The Finance Committee prepares annual budgets and annual strategic financial plans, approves the allocation of funds and payment of bills, prepares and presents to the board annually financial reports, recommends and reports to the board the investment of AFCM funds, and ensures the preparation of tax forms, licenses, and insurance for the organization.

Fundraising Committee

The Fundraising Committee leads the board's participation in resource development and fundraising. The committee is the Board's central source of information about the fundraising climate in general, and about the status of the organization's fundraising activities in particular. It identifies, cultivates, and approaches both major and minor donors. The committee also ensures that each Board member makes a yearly "contribution of record" to AFCM (with a few exceptions).

Nominating Committee

The primary responsibilities of the Nominating Committee are to identify, recruit, and nominate individuals to serve as members and officers of the Board. Based on a determination of what is needed to strengthen the Board, they develop a slate of candidates to stand for election to fill open positions at the beginning of each season. Should a Board

or officer vacancy occur during the period between elections, the committee recommends to the Board a suitable candidate for temporary appointment until the next scheduled election. The committee should examine and make any necessary changes to the AFCM bylaws to bring it up to date.

Publications and Marketing Committee

The Marketing Committee should be replaced by a new Publications and Marketing Committee. This committee will coordinate press relations, provide specialized content (program notes, etc.) for AFCM publications produced by Openform, help as needed in editing and proofreading Openform's AFCM products (including printed programs and material for the website), coordinate with Openform on future audience surveys, and handle social-media activities adhering to the standards and practices proposed by Openform and approved by the committee—all with a focus on trying to broaden our audience and deepen their engagement with AFCM.

Strategic Planning Committee

The Strategic Planning Committee promotes, coordinates, and oversees planning across the organization. It collaborates with officers, committee chairs, and the full Board in formulating, advancing, and communicating a vision for the future of AFCM and the outline of a plan to realize that vision. It develops every three years a written Strategic Plan for ongoing reference by the Board and suitable for presentation to potential donors, other funding sources, other arts organizations, and the public. It may suggest to the Board particular benchmarks to measure success in the implementation of the current Strategic Plan.