



Arizona Friends of Chamber Music Strategic Plan 2024-2026

Prepared by Claire West – Consulting

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Mission: Arizona Friends of Chamber Music brings live performances of the highest caliber to Southern Arizona, expands the understanding and appeal of chamber music to a wide and diverse audience, supports the creation of new works, and brings concerts into local schools

STRATEGIC PLANNING PROCESS

In 2023 Arizona Friends of Chamber Music undertook a strategic planning process, as the previous strategic plan was concluding. The purpose was the creation of an actionable three-year strategic plan with clear milestones, and with implications further into the future. The plan was built through a series of six intensive working sessions with a Strategic Planning Task Force, beginning in September, with a draft plan for board approval by January, 2024. The new Strategic Plan becomes active in early 2024, and concludes in January 2027. The envisioning was driven by the Question: “What does Arizona Friends of Chamber Music look like on the morning of January 1, 2027?” The comprehensive strategic planning process was assisted by the strategic planning facilitation firm, Claire West - Consulting. Principal, Claire West, has a relationship with AFCM reaching back to the 1990s.

Arizona Friends of Chamber Music (AFCM) was founded in the 1940s and steadily grew to represent Tucson’s go-to series featuring top-notch touring musicians from around the world. In the 1990s, still operating primarily as a volunteer-driven concern, the Piano & Friends series and Tucson Winter Chamber Music Festival were added, as audiences clamoured for more and concerts sold out. Today, AFCM continues its tradition of representing the chamber music genre in its highest professional form.

The AFCM long-range plan is built on distinct pillars or priorities -

GOVERNANCE

INFRASTRUCTURE/ADMINISTRATION

FINANCE

AUDIENCE/DONOR DEVELOPMENT

Goals to be reached by 2027 are attached to each Pillar. Each goal is followed by objectives, tactics, timing, responsibility, and measurement.

On the following pages are a Summarized Plan, a Full Plan with detail, and a Summary by Year.

STRATEGIC PLANNING TEAM

Cathy Anderson (staff), Laurence Herron (board), Alan Hershowitz (board), Paul St. John (board), Leslie Tolbert (board), Claire West (facilitator)

ACKNOWLEDGEMENTS

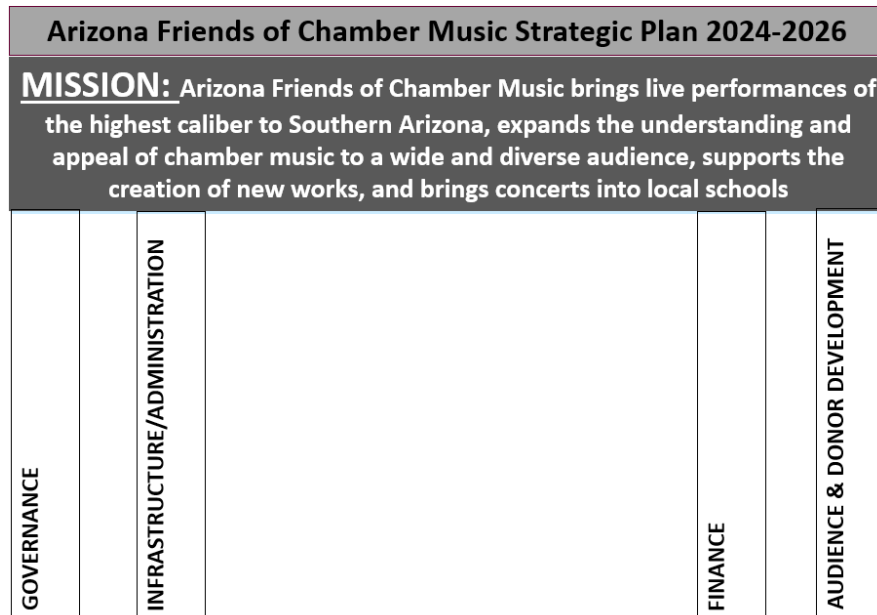
Community Foundation for Southern Arizona's Center for Healthy Non-profits "TeamUp" program for providing partial funding; Leslie Tolbert and Paul St. John for hosting the working groups; Alan Hershowitz for coordinating the process; Neveah Benally for providing intern assistance to Claire West – Consulting.

Arizona Friends of Chamber Music Strategic Plan 2024-2026

The Arizona Friends of Chamber Music Strategic Plan is designed in support of the organization's mission.

Mission: Arizona Friends of Chamber Music brings live performances of the highest caliber to Southern Arizona, expands the understanding and appeal of chamber music to a wide and diverse audience, supports the creation of new works, and brings concerts into local schools

Vision: A thriving chamber music presence enhances the cultural life of Southern Arizona



HOW TO USE THIS PLAN

Ideally, a functional Strategic Plan guides organizational decisions for the duration of the Plan – in this case, early 2024 through January 1, 2027. Leadership at AFCM embraces this concept. This Strategic Plan document guides the overarching functions of Governance, Infrastructure/Administration, Finance, and Audience/Donor Relations, all in service of the artistic mission. A good strategic plan is active, dynamic. A good plan is also disciplining, freeing the users from making decisions in a vacuum – the plan is the roadmap. Progress will be tracked at least monthly, using Key Performance Indicators, and strategies adjusted, if necessary, annually. Whilst rigorous, the plan does not confine the organization – it allows for opportunistically seizing the moment when new possibilities arise. A strategic plan is a great thing to share with stakeholders – a one page summary will be useful for donors, funders, audiences, potential board members, influencers, elected officials, and partners.

Summary

By January 2027 AFCM has:

	Pillar	Goal
	Governance	<ul style="list-style-type: none"> • Professionalized identification, cultivation, nomination of board candidates • Changed leadership structure to include Advisory Committee and Support Organizations • Transitioned Board into a Governance Board • Created a Board Succession Plan • Procedures which coordinate and enhance Committee work • A strengthened finance committee
	Infrastructure/Administration	<ul style="list-style-type: none"> • Engaged appropriate staffing • Optimized technology (ticketing, CRM, website, and other software) • Altered the time and place of programs • Identified office space • Initiated Management Policies & Procedures
	Finance	<ul style="list-style-type: none"> • Auditable financials • A framework for grantwriting • A robust Financial Plan • Codified the annual budgeting process • A budget demonstrating an annual cash surplus • Formalized Endowment Funds (Purpose, Management, Policies) • A 50% increase in fundraising income over 2023 • Budget discipline across the organization
	Audience/Donor Development	<ul style="list-style-type: none"> • Engaged a Development Director • Increased ticket sales (in numbers sold) over 2023 • An up to date website • Tracked audience diversity in age and demographics • Solicited more donors & larger donations • More and well attended Donor Development /Engagement Events • A campaign to pay more attention to donors • A unified message from Board when communicating with audiences and donors

		<ul style="list-style-type: none"> • Investigated donors’ capacity • Unified advocacy with other similar arts organizations in Tucson/Pima County • An advocacy campaign for funding for music education in the schools

Detail

By January 2027 AFCM has:

	Pillar	Goal
	Governance	<p>Professionalized identification, cultivation, nomination of board candidates</p> <p>Objective: efficient and productive board.</p> <p>How: as a project of the governance and nominations committee.</p> <p>When: Yr I</p> <p>Who: governance and nominations committee.</p> <p>Measure: April 2024 board meeting, governance and nominations committee presents the board manual/packet and the procedures for identification, cultivation, nomination of board candidates, (potentially ask the Team Up program at CFSAZ for some consultant help with the procedures); from then, the process is ongoing.</p> <p>Changed leadership structure to include Advisory Committee and Support Organizations</p> <p>Objective: the board of directors hews to its stated role, whilst support organizations have less responsibility than the board and clear tactical tasks; Advisory Committee functions as a prestigious honorary board for heightened AFCM profile.</p> <p>How: regularize these adjunct bodies – determine leadership, purpose, charter, liaison to/with the board & staff, as the basis of populating them.</p> <p>When: Yrs II & III</p> <p>Who: governance and nominations committee.</p>

Measure: each support group has its charter and structure; advisory committee is published on the masthead.

Transitioned Board into a governance Board

Objective: for controls; for professionalization; to move into current lifecycle stage and away from a board-run organization; to free the organization to engage management staff; to assure longevity and sustainability.

How: governance and nominations committee devise action steps to guide the board toward good governance practices.

When: Yr II

Who: governance and nominations committee.

Measure: at the end of Yr II, and annually after that, the board and staff will assess progress.

Created a Board Succession Plan

Objective: keep the board stable and vigorous; board is seen as an aspirational board; attract board candidates and contributions; succession is predictable and smooth; continuity is assured.

How: governance and nominations committee present an explicit plan to the board, with detail on how to transition board positions and officership, and with specific goals for the year. This may include apprenticeship, mentorship, orientation. The plan will refer to the evolving culture of the board, and play to the distinct strengths of each member.

When: Yr I

Who: governance and nominations committee.

Measure: implement written plan by end of Yr I.

Procedures which coordinate and enhance Committee work

Objective: efficiency, enhanced communication, no duplication.

How: committee assignments, individuals assignments, regular reports to board, clear required line of communication, action approval, agreement of committee members, relationship to Strategic Plan.

When: Yrs I & II

Who: Executive Committee

Measure: committee rubrics with a check list of comparisons to current practice (prompts for introspection). Formalized assignments, lines of communication, agreements. Progress to goal is a regular agenda item for board meetings.

	<p>A strengthened finance committee</p> <p>Objective: committee discipline; responsible supervision of finances; various committees engaged earlier in the budgeting process; leading the board in fiduciary responsibility over organization’s assets; taking a high level view of the organization’s finances.</p> <p>How: define committee role; prospect board members with not for profit finances experience; prospect committee members with not for profit finances experience.</p> <p>When: Yr II</p> <p>Who: Chair of finance committee, treasurer, governance and nominations committee, executive committee.</p> <p>Measure: 990s have been uploaded to Guidestar.</p>
<p>Infrastructure/Administration</p>	<p>Engaged appropriate staffing</p> <p>Objective: the board and board committees can focus on governance; increased ability to fulfill mission; heightened profile as a good investment; increased earned income.</p> <p>How: create a staffing plan that lists priorities, and assign salaries to each, emphasizing fundraising and marketing; current Director of Operations rewrites job description to break down tasks that can be delegated, and align job requirements with individual strengths.</p> <p>When: Yrs I, II, III</p> <p>Who: Executive Committee, current Director of Operations.</p> <p>Measure: staffing plan is created; job descriptions written; procedure for filling staff positions in place; staffing costs integrated into operating budget.</p> <p>Optimized technology (ticketing, CRM, website, and other software)</p> <p>Objective: become current in technology utilization; replace current patron management CRM with a more useable and proficient model. Integrate donor and patron management in a shareable system.</p> <p>How: form a technology committee or accessory committee.</p> <p>When Yr I</p> <p>Who: Director of Operations, Director of Finance and Marketing lead.</p> <p>Measure: formation of technology/accessory committee, recommendations/presentations to executive committee, new CRM in place and in use by end of Yr 1.</p>

		<p>Altered the time and place of programs</p> <p>Objective: reclaim robust audience attendance; respond to needs and requests of aging audience; address audience traffic patterns; build the next generation of audiences.</p> <p>How: research other venues (location less difficult to drive to, to park, to walk to concert); study previous research conducted by facilities committee; survey audience; change the start times of concerts.</p> <p>When: Yr II</p> <p>Who: marketing committee and staff.</p> <p>Measure: present two to three options to board for locations and times. Longer term, increased ticket sales over 2023.</p> <p>Identified office space</p> <p>Objective: as AFCM staffs-up, will lead to greater efficiency, communication, and coordination; housing for supplies and equipment; consistent location for board meetings; opportunity for an in-kind space donation; street address as opposed to a Post Office box; a place of business for patrons; a physical identity.</p> <p>How: development committee task force.</p> <p>When: Yr II</p> <p>Who: development committee task force.</p> <p>Measure: Task Force report to the board on findings; AFCM has secured a physical address.</p> <p>Initiated Management Policies & Procedures</p> <p>Objective: to ensure the current draft is converted to comprehensive management policies and procedures in written form; increased efficiency; diminish legal exposure; provide clarity and protection for the staff.</p> <p>How: current Director of Operations will formalize the current standard operating procedures and present to executive committee. Identify a HR specialist to review.</p> <p>When: Yr I</p> <p>Who: executive committee and current Director of Operations.</p> <p>Measure: Approved Management Policies & Procedures.</p>
	Finance	<p>Auditable financials</p> <p>Objective: increased transparency, respectability, ability to attract donors and secure loans.</p>

How: learn how to implement financial reports; utilize an external advisor to balance internal expertise.

When: Yr I

Who: finance committee.

Measure: procedures for getting data and systems to generate internally auditable financials, and preparation for sharing with donors. Board has increased understanding on reading financial reports and financial concepts and terms.

A framework for grantwriting

Objective: organized approach to grantwriting.

How: current Director of Operations will research usable template to generate a grants calendar, integrate it into the CRM, and create grant language templates for incorporating into applications.

When: Yr I

Who: current Director of Finance & Marketing, current Director of Operations, Development Committee.

Measure: development of a formal schedule of grant prospects.

A robust Financial Plan

Objective: a comprehensive financial plan as compared to 2023; balanced budget; increasing fund balances; reserve fund.

How: set goals in financial committee meetings.

When: Yr I

Who: Finance committee, with input of executive committee and development committee.

Measure: running summary of financials yearly, with projections and quantifiable goals, with assessments built in. Defined use of certain accounts. Programming is matched to fund balances. In Yr II some indicators will be examined.

Codified the annual budgeting process

Objective: a functional system for creating the annual budget.

How: finance committee sets deadlines for each committee contributing to the budget process to submit their numbers.

When: Yr I

Who: staff and Finance Committee leads all cooperating committees.

Measure: February deadline met for all numbers to go into the draft budget.

A budget demonstrating an annual cash surplus

Objective: financial sustainability and stability.

How: increase revenue, monitor costs. Examine each income stream to discern how it is made up, and ensure optimization. E.G Analyze each activity revenue & expense for ROI.

When: by Yr III

Who: Finance Committee leads, Marketing Committee, Development Committee, Artistic Committee.

Measure: by Yr III, operational net @ 10% percentage over expenses comparative to 2023.

Formalized Endowment Funds

Objective: fiduciary responsibility. As endowment grows, ensure donors can be confident that funds are used as directed/for specified purpose. Demonstrate how the interest fits into operations.

How: draft investment policies.

When Yr I

Who: Finance Committee and development committee.

Measure: policies approved by board and proudly shared on Guidestar.

A 50% increase in unrestricted fundraising income over 2023

Objective: a means to accomplish a budget surplus, strengthening of programming, operational stability.

How: increase fundraising activity.

When: by end of Yr III

Who: Development Committee, Finance Committee

Measure: 50% increase in unrestricted fundraising income over 2023.

Budget discipline across the organization

Objective: tracking fundraising activity and tracking expenses decreases liability; committees abide by processes in budgeting (e.g. committee deviation from budget requires justification and approval from board beyond a certain dollar amount).

How: create policies & procedures.

		<p>When: Yr I</p> <p>Who: Finance & Executive Committees lead all other committees.</p> <p>Measure: written policies and procedures to control committee budgeting (e.g. commissioning is better integrated into the budgeting process).</p>
	<p>Audience/Donor Development</p>	<p>Engaged a Development Director</p> <p>Objective: maximize and professionalize increase in fundraising activity; activate and oversee the board's development activity.</p> <p>How: create job description; create budget line item.</p> <p>When: by Yr II</p> <p>Who: Executive Committee & Development Committee.</p> <p>Measure: hire of a Development Director.</p> <p>Increased ticket sales (in numbers sold) over 2023.</p> <p>Objective: increased revenue; expands the understanding and appeal of chamber music.</p> <p>How: considerations - marketing surveys, programming choices, venue, timing, enforced board commitment to bringing new audience members, incentives for audience (BOGO etc.)</p> <p>When: Yr I</p> <p>Who: Marketing committee, artistic committee, executive committee, governance committee.</p> <p>Measure: increased ticket sales to reach the level that was budgeted for FY 24 (# tickets based on 3 year average of pre pandemic).</p> <p>An up to date website</p> <p>Objective: attract and retain patrons, increase community profile.</p> <p>How: engage an external coder, codify maintenance duties in a staff job description, encourage board members to be vigilant about areas that they notice that need attention.</p> <p>When: Yr I</p> <p>Who: Executive Committee & Marketing Committee.</p> <p>Measure: own the IP for website, regular reports to board or executive committee by director of marketing on progress towards goal.</p>

Tracked audience diversity in age and demographics

Objective: honour mission statement.

How: establish a baseline – measure AFCM audiences over a period of years, starting with existing data (e.g. utilize Data Arts reports), new CRM, surveys, ask AZEN for help (Arizona Evaluation Network).

When: Yr I, continue through Yr III

Who: Marketing and Development

Measure: established a baseline of for tracking demographic data.

Solicited more donors & larger donations compared to 2023

Objective: increase revenue & endowment revenue.

How: multiple factors, including Larry & Cathy continue face to face solicitations, create donor list for sharing with Development Committee regarding tailored approaches, communications in newsletters that demonstrate where the money has been invested, donor testimonials, donor appreciation, pre concert announcements.

When: Yr I

Who: Development Committee.

Measure: by end of Yr I the number of asks has increased over 2023 by 25%. This will drive goals for the next two years.

More and well attended Donor Development/Engagement Events

Objective: increased donations, increased sense of community.

How: organized receptions.

When: Yr I

Who: Development Committee.

Measure: number of events, structure of events, attendance, donations, reports to board.

A campaign to pay more attention to donors

Objective: Increased focused attention on donors and celebration of donors.

How: announcements from stage, in printed program and in newsletter, as appropriate in meetings with donors, thank

you notes. targeted planning (moves management), learn donors' interests.

When: Yr II

Who: Development Committee, Board.

Measure: how many are "touched" over a 12 month period, increased/continued donations.

A unified message from Board when communicating with audiences and donors

Objective: message for board to use in communicating with the public; personal engagement with audiences.

When: Yr I

How: create talking points, put talking points into use.

Who: Development Committee, Executive Committee.

Measure: talking points are created, in use, with examples of how used.

Investigated donors' capacity

Objective: tailor fundraising activity.

How: build on current donor activity investigate potential donors for giving in other areas, zip code, housing info, profession, research engines.

When: start in Yr I continue in years II & III

Who: Development Committee, Development Director.

Measure: increased knowledge entered into CRM.

Unified advocacy with other similar arts organizations in Tucson/Pima County

Objective: to increase interest in and support for the arts, leading to increased public support for the arts, including classical music performance.

How: coordinate with Arizona Citizens for the Arts, Pima Community College, Opening Minds through the Arts, and other local organizations to add the AFCM voice to effective public advocacy efforts, especially for public (governmental agency) funding.

When: Yrs I – III

Who: Executive Committee

Measure: regular reports at board meetings on focused interaction activity with other arts organizations with goals similar to AFCM.

	<p>An advocacy campaign for funding for music education in the schools</p> <p>Objective: to increase community engagement, quality of life for children/families/community through music; increase in size of AFCM audience and support for live chamber music.</p> <p>How: contact Pima Community College, Opening Minds through the Arts organization, others to see where combine forces can promote music education and performance</p> <p>When: Yrs I – III</p> <p>Who: Executive Committee with input from board members involved in education and outreach</p> <p>Measure: development of effective contacts with local education leadership</p>

By Year	
By January 2027 AFCM has:	
Pillar	Goal
Governance	
Year I	<ul style="list-style-type: none"> • Professionalized identification, cultivation, nomination of board candidates • Created a Board Succession Plan • Procedures which coordinate and enhance Committee work
Year II	<ul style="list-style-type: none"> • Changed leadership structure to include Advisory Committee and Support Organizations • Transitioned Board into a Governance Board • Procedures which coordinate and enhance Committee work • A strengthened finance committee • Altered the time and place of programs

	Year III	<ul style="list-style-type: none"> • Changed leadership structure to include Advisory Committee and Support Organizations
	Infrastructure/Administration	
	Year I	<ul style="list-style-type: none"> • Engaged appropriate staffing • Optimized technology (ticketing, CRM, website, and other software) • Initiated Management Policies & Procedures
	Year II	<ul style="list-style-type: none"> • Engaged appropriate staffing • Identified office space • Altered the time and place of programs
	Year III	<ul style="list-style-type: none"> • Engaged appropriate staffing
	Finance	
	Year I	<ul style="list-style-type: none"> • Auditable financials • A framework for grantwriting • A robust Financial Plan • Codified the annual budgeting process • Formalized Endowment Funds (Purpose, Management, Policies) • Budget discipline across the organization
	Year II	<ul style="list-style-type: none"> • A budget demonstrating an annual cash surplus
	Year III	<ul style="list-style-type: none"> • A budget demonstrating an annual cash surplus • Doubled fundraising income over 2023 • A 50% increase in unrestricted fundraising income over 2023
	Audience/Donor Development	
	Year I	<ul style="list-style-type: none"> • Increased ticket sales in numbers sold and prices bought over 2023 • Incentives for audience which are realizing increased attendance • An up to date website • Tracked audience diversity in age and demographics • Solicited more donors & larger donations

		<ul style="list-style-type: none"> • More and well attended Donor Development/Engagement Events • A unified message from Board when communicating with audiences and donors • Personally engaged with audiences • Learned donors' interests • Investigated donors' capacity • Unified advocacy with other similar arts organizations in Tucson/Pima County • An advocacy campaign for funding for music education in the schools
	Year II	<ul style="list-style-type: none"> • A campaign to pay more attention to donors • Investigated donors' capacity • Tracked audience diversity in age and demographics • A unified message from Board when communicating with audiences and donors • Unified advocacy with other similar arts organizations in Tucson/Pima County • An advocacy campaign for funding for music education in the schools
	Year III	<ul style="list-style-type: none"> • Engaged a Development Director • Investigated donors' capacity • Tracked audience diversity in age and demographics • A unified message from Board when communicating with audiences and donors • Unified advocacy with other similar arts organizations in Tucson/Pima County • An advocacy campaign for funding for music education in the schools

APPENDIX

1. Arizona Friends of Chamber Music Board of Directors, 2024
2. Lifecycles Graphic

Arizona Friends of Chamber Music Board of Directors

Alan Hershowitz, President

Leslie Tolbert, Vice President

Paul St. John, Treasurer

Larry Herron, Secretary

Kaety Byerley

Michael Coretz

Dagmar Cushing

Bryan Daum

Timothy Kantor

Juan David Mejia

Lyla Rothschild

Elaine Rousseau

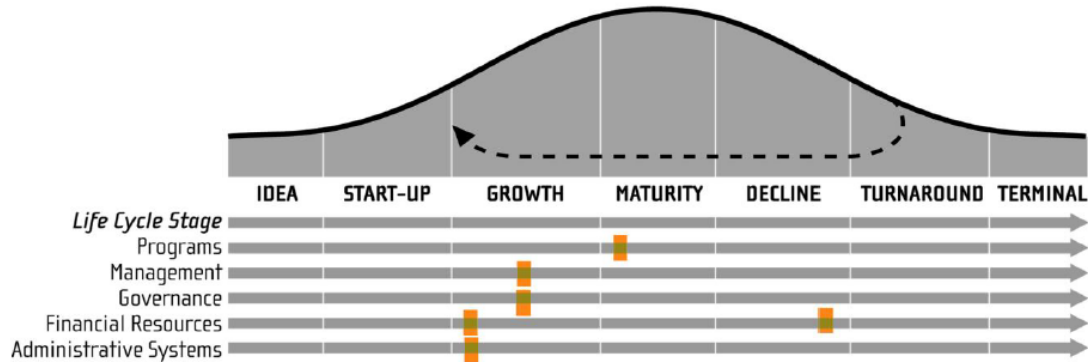
Randy Spalding

Joseph Tolliver

President Emeritus

Cathy Anderson AFCM Operations Manager

Lifecycles graphic



The Nonprofit Lifecycles model examines not only where an organization may be in its lifecycle, but where each of its key functions are in the trajectory – ideally, they are in close alignment on the horizontal scales. The Arizona Friends of Chamber Music Strategic Planning Task Force conducted this exercise in September, 2023. An analysis of the observations of the Planning team demonstrates the organization direction moving positively due to recent (since the last strategic plan) changes in management, infrastructure and governance. The team was generally in agreement that the programs were in the best position, with the other functions of the organization in healthy growth mode. Importantly, the exercise confirmed that with an organization as venerable and valuable as AFCM, it has seen a series of lifecycles, and has “turned-around” several times, with various functions seeming in late startup/early growth due to revivification.

Key to the Terms:

IDEA – Fulfilled a Dream. Saw a Need.

START-UP – Creative, Experimental, more Breadth than Depth, Willing to take on anything, vast expenditures of Energy.

GROWTH – Protocols developed, methods set, niche developing, services less person-dependent, staffing and governing separate.

MATURITY – Organized, Focused, in touch with community and constituents, balance favourite programs with relevance.

DECLINE – Rigid, Status quo, operating on prior models, losing constituents, cumbersome procedures, uncompetitive.

TURNAROUND – Analysis, Reassessment, Modifications, Constituent and Stakeholder input sought, Scaling back.

TERMINAL – Decision to sunset or merge, Under-resourced, Untenable.

Susan Kenny Stevens, Ph.D., Nonprofit Lifecycles: Stage-Based Wisdom for Nonprofit Capacity

AzFCM 2023