



**Hartford Symphony Orchestra  
Draft Strategic Framework Report  
May 5, 2015**

**Background: A Commitment to Transformative Change**

Orchestras all over the country are in “crisis”, struggling with aging audiences, the lack of arts education in schools, high, built-in cost structures, waning public-sector support, a shift in philanthropy from the arts to social needs, and, perhaps, most lethal to all, a perceived lack of cultural relevance.

In varying degrees, the HSO is faced with all of these challenges - - and several more:

- 1) For an enterprise of its history, size, and impact, the HSO – with its minimal endowment of under \$9 million – is severely undercapitalized.
- 2) The economic challenge of the recent decade combined “with” the non-growth status of Hartford have threatened the orchestra's growth and well-being.
- 3) HSO's current business model, which results in annual deficits in excess of \$1.3 million is unsustainable, the HSO's \$2 million line of credit is now fully drawn. In addition, despite concentrated efforts, subscriptions have trended downward and total ticket sales have been essentially flat since 2011.

To stem these life-threatening trends of endowment and audience erosion, the HSO has embraced a multi-pronged plan for transformation.

- 1) Organizational Change. In March of 2014, the HSO proactively entered into an innovative two-year management services contract with The Bushnell which is resulting in overhead efficiencies, considerable operational cost savings and the provision of important organizational capacity for the planning and capital fundraising required to achieve stability.
- 2) Financial Change. In spring of 2014, the HSO launched a \$10 million Stabilization Campaign to raise current-use funds for urgent needs and begin to strengthen the financial base. This campaign is the first phase of required capital growth; a second phase of endowment building and planned giving is tentatively planned to launch coincidentally with the HSO's 75<sup>th</sup> Anniversary.
- 3) Strategic Direction. While the above efforts are significant; they alone will not solve the problem. A new business model must be identified if the HSO is to survive and grow. With this reality in view, this strategic planning process seeks to “dive deep” – to “wrestle down” fundamental questions about classical music today, its current and future audiences, and the role of a symphony orchestra in our 21<sup>st</sup> century community. The process seeks to respect the HSO's distinguished history, while acknowledging that we must “use a blank piece of paper” to create a secure and promising future.

## The Planning Process: Expected Outcomes

### Expected Outcomes

1. A 3-year Strategic Framework which would include a clear vision of the impact the HSO hopes to have, and an explicit understanding of the organization's mission and values which is shared among Board, staff and external constituencies.
2. A viable business model and a 3-year blueprint for action which would include core strategies and establish short and long-term priorities, growth markets and goals for annual and endowment fundraising.
3. Revised 10-year Stabilization Plan projections.
4. Information that can be used to evolve the brand and successfully market the organization to the public and potential funders.
5. An unwavering commitment to change –and the recognition that its achievement will require all orchestra constituents to work together in mutually supportive and cooperative ways throughout.

## What we've heard to date: What do we believe?

The HSO's mission, values and guiding principles have been confirmed and expanded.

### A. Mission

To perform live orchestra music of the highest quality for ever-expanding audiences, and to increase, through its educational programs, the understanding and enjoyment of that music by residents of Connecticut.

### B. Values

Artistic Excellence  
Passion  
Collaboration/Partnership  
Diversity  
Engagement  
Service  
Accessibility

Relevance  
Innovation  
Respect  
Integrity  
Communication  
Accountability  
Fun

C. Guiding Principles and Beliefs

1. Classical music. It is a part of our right of heritage – the right to explore music - - as well as literature, drama, painting and dance that define both our nation’s collective experience and our individual and community traditions.
2. All people deserve opportunities to access classical music. Each American has the right to know about and explore classical music of the highest quality and to the lasting truths embedded in those forms of expression that has survived in many lands through the ages.
3. Our community and its citizens deserve a rich and varied cultural life of the highest quality.
4. Classical music is a powerful and multi-faceted resource which should be deployed to the benefit of the individual and community. Music has the power to transform lives.
5. HSO can make a difference in the quality of life for the cultural Connecticut region and its residents through performance, education and community engagement and participation. Music brings us together.

**What do we want to be? What does success look like?**

This draft vision, composed of consensus “keywords” will be re-visited at the end of the planning process - - and ultimately, shaped into a narrative statement.

Vision: A model 21<sup>st</sup> Century Regional Orchestra.

- Artistically:            Excellent, Distinctive, Bold, Adventuresome, Exciting, Engaging
- Organizationally:    Dynamic and Innovative
- Financially:            Stable and Growing - - an increasing number of audience members and donors.
- Reputationally:        Respected, high-profile and widely perceived as an artistic and community leader in Greater Hartford. Well known for deploying music to meet community needs and making music central to cultural life in Greater Hartford.

## What obstacles do we face? What questions must we answer?

The in-depth institutional evaluation – including The Bushnell's 2014 management audit, a SWOTS exercise, and comprehensive financial trends analysis – underscored a sense of urgency and identified the following principal challenges, which the committee has placed in priority order.

1. Reputation: What does the HSO brand stand for in the 21<sup>st</sup> century? For whom?
2. Relevance: What programs and services will best meet the needs of our current and future audiences?
3. Revenue: A sustainable business model must be developed providing increased revenue short, mid and long term.
4. Reach: How do we market, engage and energize our current and future audiences and donors?
5. Resources: What human (administrative staff, artistic personnel and volunteers) and other resources are required to support a new vision for HSO?

### Challenge 1: Reputation Leading Thoughts on Institutional Positioning: HSO Brand of the Future

#### **BIG IDEA: Unleash the Full Power of HSO's Musical Vibrancy** Expand the Brand

Orchestral music in Greater Hartford can be reborn, by reconnecting with our larger cultural life, and becoming a truly contemporary art for tomorrow's audiences. Under Maestra Carolyn Kuan, one of the most creative and respected young voices for symphonic innovation in America, *the HSO is ripe for reinvention*.

The HSO brand of the future – while always having classical symphonic music at its core -- should broaden to embrace other types of quality music - - particularly those that are classically-based or inspired musical forms.

The focus should be on working to bring classical music and other music into the lives of everyone in our community. This will enable the HSO to present and perform to a significantly enlarged audience – and enable us to develop “creative pathways” to our core product and programs. It will also create excitement and increase revenue potential.

A. Key hallmarks for the future brand – which will also serve as the strategic imperatives guiding our program development include:

1. Excellence
  - Display excellence in everything we do onstage, behind the scenes, and beyond our walls.
2. Market-driven
  - Offer programming and services which are fully responsive to the interests, tastes and needs of our multiple constituent groups.
3. Innovation
  - Leveraging creativity and technology on stage and all platforms to add a visually exciting dimension to the patron experience.
4. Engagement
  - Strengthen relationships with audiences and the community through a variety of authentic interactions.
5. Talent Development
  - Promote music making widely in the community and celebrate music makers, including our musicians.
6. “Remark-ability”
  - Create unique, buzz-worthy programs, services and events which clearly define the benefits of our brand to key stakeholder groups.

B. Brand Positioning. To reach current and future audiences, we must rebrand the organization and it must be clearly articulated and consistently communicated.

Most critically, the HSO’s new brand positioning must not only inform our public about “what” the HSO does (presents quality symphony orchestras, etc.), but more importantly, “why” the HSO exists and “why” people should care. What is the HSO’s value proposition with the community in the 21<sup>st</sup> century? A comprehensive new brand architecture, comprised of a brand promise and brand pillars - - and a new visual identity program (logo, tagline, etc.) will dynamically re-animate both the HSO’s great tradition and its exciting future under the brilliant Carolyn Kuan - - a future which will offer a bounty of artistic and educational benefits to expanding and increasing diverse audiences.

**Challenge 2: Relevance**  
**Challenge 4: Reach**  
**Leading Thoughts on the HSO’s Future On-stage Programming & Audience Development**

The Committee recognized and welcomed the fact that the HSO audience is threefold: individuals who are frequent classical music listeners and patrons, those who listen and/or attend occasionally, and some who are entirely new to classical music. Therefore, programming must appeal to many segments across the audience spectrum, from “purist” to neophyte.

A. Current Programming: Draft Recommendations

1. Masterworks: Maintain and enhance in accordance with the preferences of our most traditional classical music audience.
2. POPS & Talcott Mountain: Maintain and enhance, perpetually freshen.

3. Sunday Serenades: Maintain but retool following better understanding of target audience.
  4. Musical Dialogues: Funding permitting, maintain and improve.
- B. Potential New Programming: Draft Recommendations for prospective programming
1. Classical Conversations – Introduce in updated format.
  2. Opera programming, in collaboration with other arts organizations.
  3. Dance programming, in collaboration with other arts organizations.
  4. Chamber Orchestra Series, envisioned as a show with unique “production values” which would be mounted in different venues throughout Greater Hartford to promote the perception that “HSO is everywhere”.
  5. Master Class Series, which would promote learning and community engagement.
  6. “Hip” programming for young adults, staged at “alternative” venues which likely will combine music with food, drink and socializing.

**BIG IDEA: Extend Reach by Fully Leveraging Technology**  
The Institute for Digital Performance Art

Background:

Although orchestras have traditionally viewed audiences as passive consumers, the most progressive orchestras are shifting toward a more participatory framework in which community members and patrons interact with the musicians and the music itself—both in and out of the concert venue.

One of the most obvious tools to facilitate this kind of interaction is technology. Yet, until recently, orchestras have largely ignored many of the technological advancements obtained during the digital age. As institutions that privilege the live concert experience, many orchestras have been resistant to reach a public that increasingly depends on virtual modes of entertainment and communication.

There are noticeable exceptions: some of the world's most progressive orchestras have begun to successfully incorporate technology into their on-stage programming, audience experience, as well as their day-to-day operations in marketing, engagement, education and outreach. Some interesting examples are attached in Appendix 1.

An HSO Institute for Digital Performance Art, the funding for which has attracted preliminary interest from the State of Connecticut, would enable the following:

**Content Creation for Stage and Operations**

1. Equip 97 Elm Street, the proposed headquarters of the Institute, with offices, sound, video and animation studios. In addition, implement live-feed and video production capabilities at all Bushnell's theaters and HSO's other off-site venues – transforming them into an integral, interactive and compelling part of the performance and dramatically changing the user experience.

- Beyond the traditional projection screen above the orchestra, smaller and more flexible installations will allow images to be projected on walls, floors, ceilings and non-permanent surfaces throughout the theater.
  - An intimate connection will be established between audiences and performers – imagine watching Maestra Kuan emote, a pianist's fingers fly across the keyboard, or the priceless expression of a child enraptured by a performance.
  - Virtual sets will be created for staged opera and theatrical concert productions – sets that require no physical materials to build, no physical space to store, and can be cataloged for future use or provided to others for a fee providing new HSO revenues.
2. Secure broadcast opportunities beyond the concert hall to television, social media, and emerging markets yet to be defined.

- Television Distribution

A new commercial revenue stream will be created by marketing the HSO at Belding Theater as one of the only integrated “go-to” resources for orchestral video production work in the country, and the ability to rent the HSO equipment to the Bushnell and outside presenters. Exciting projects already in discussion include:

**Live With the HSO from The Bushnell**

Connecticut Public Broadcasting Network has expressed interest in this exciting project. CPBN's Live From Infinity Hall is currently viewed on more than 170 PBS networks across the country. The “Live With the HSO” series would feature innovative, performances curated and conducted by Maestra Carolyn Kuan. The series would include 6 - 10 recorded concerts per year and would be distributed nationally.

**Rocktopia**

Producers William Franzblau (Say Goodnight Gracie, Wonderland) and Rob Evans (Trans Siberian Orchestra) have conceived Rocktopia as a blending of classical music with power-rock anthems. Employing a 50-piece orchestra, full gospel choir and a rock band (with Evans as lead vocalist) this live stage show includes such pairings as Puccini's Nessun Dorma with Led Zeppelin's Kashmir and Stravinsky's Infernal Dance from Firebird with Bruce Springsteen's Born to Run. The producers have negotiated a national distribution deal with the Public Broadcasting System and are now in discussions with the HSO and The Bushnell to produce and video record the concert at The Bushnell, using the HSO as the orchestra.

**Playing with Food: Featuring Fabio Viviani & Available for National Tour**

This HSO original concept, concert production, pairs orchestral music with culinary arts. Set for its third incarnation in March 2015, it is poised to take the leap to the national stage by featuring a nationally recognized celebrity chef in March 2015. The Institute will enable live camera video fed to large scale LED screens mounted throughout Mortensen Hall, and to a potential national audience, while positioning the production for national touring possibilities.

- Mobile: HSO performances and related content, in part, will be provided to audiences on their mobile devices via live streaming, pay for service, etc.
- Social Media: Content will be marketed via social media and related technology in the manner of commercial enterprise.

3. Form alliances with creative organizational partners and individual artists to establish a cutting-edge “hub” of acoustic/electronic music and video production in Hartford.
  - o Creative artists from worlds as disparate as film music, popular music, opera, electronic dance music, and ethnic music from around the globe will collaborate under the “umbrella” of a great symphony orchestra. Pop music artists, *A Great Big World*, have already expressed interest in developing a concert program of this nature.
  - o A new composer's forum will be created in partnership with area music schools to spur creative development, – joining the ranks of industry leaders MIT, Stanford University and Apple Inc.
4. Form alliances with education partners to establish a digital learning laboratory for the performing arts.
  - o A young musicians program or possibly fellowship will be established in partnership with area music schools to provide learning opportunities for the musicians of tomorrow – those who embrace the use of technology and break all barriers of genre.
  - o *Young People's Concerts* will take advantage of the above referenced production concepts and streamed to CT schools – moving orchestral music from the musty concert hall of old to the captivating art form of today and tomorrow.
  - o The HSO website and YouTube channels will become true community education resources.

## **Marketing**

Provision of compelling programming, a positive and engaging patron experience - - and excellent marketing are all critical to the success of current and future HSO programming. As our customer trends analysis demonstrates, HSO subscriptions have been declining while total tickets sales revenue has remained generally flat for the past five years. Limited staff and financial resources - - as well as virtually no market research or customer data have combined to create a significant challenge in the marketing area.

One deficiency was overcome during the planning process. HSO Director, Rebecca Loree, stepped up to donate the services of her company, Corbin Consulting, to conduct a comprehensive market research study which garnered responses from over 5,000 HSO and Bushnell patrons. Most importantly, this rich database can be “mined” for real market information, which will inform HSO's program development and marketing strategies. Also in this process, the services of noted cultural consultant Kate Prescott, were secured courtesy of Director Wes Boyd. Based on Prescott's in-depth study and knowledge of American symphony orchestras, the Committee embraced the following principal recommendations:

1. Improve subscriber retention and lapsed subscriber recapture programs. (Better targeting and target-specific strategies, more discipline and data rigor - - better “blocking and tackling”).
2. Review all pricing and packaging options to improve sales and total revenues. Implement dynamic pricing.
3. Drive attendance frequency, with special attention to the return of first-time ticket buyers. Frequency - - similar to the affinity created by subscription - - drives not only ticket sales but, as importantly, donations.
4. Focus intently on building stronger relationships (customer care service and loyalty programs)



**BIG IDEA: Maximizing the Life Time Value of our Customer**  
A Patron-Centric Operating Model

The HSO must embrace a patron-centric mode of operations (see attachment A) which efficiently and effectively builds patron loyalty. Patron loyalty means developing stronger, longer relationships with your audience - - systematically converting new buyers into frequent buyers or subscribers and converting them to donors. Successful conversions equate to the maximization of each patron's "life time value" to an arts organization.

In order to effect this change, HSO operations must be departmentally "de-siloed", instead working together to develop integrated marketing plans - - which are embraced and executed by each department that "touches" the patron (marketing, communications, development, box office, operations, etc.). A new CRM (customer relationship management) model, which systematically moves patrons to ever increasing levels of participation, offers the potential to significantly increase the engagement and participation of new and future HSO patrons.

To accelerate progress on key branding and marketing initiatives, it was recommended that: The HSO join forces with The Bushnell Marketing committee, chaired by Connie Weaver, National Marketing Director for TIAA-CREF. This committee, stocked with people of great and varied marketing experience, has enabled The Bushnell to develop an integrated marketing approach, which has paid significant dividends. This committee, vice-chaired by HSO Director and Bushnell Trustee, Rebecca Loree, has offered to be of service to the HSO.

**Challenge 2: Relevance**  
**Challenge 4: Reach**

Leading Thoughts on HSO's Programming and Outreach in the Community

These observations and recommendations are drawn from the 2014 Needs Assessment Report, commissioned by the HSO Education Committee and conducted by Mitchell Korn, a nationally-respected arts-in-education consultant and advisor to many of America's leading orchestras. Highlights of the report follow:

A. Methodology

**Qualitative interviews, using a formal discussion protocol**, with several dozen school, community, parent, civic, arts, government and philanthropic representatives.

**Quantitative surveys with over seventy individuals** including musicians, board members, teachers, parents, students, administrators, and lifelong learners, which greatly informed our findings and recommendations.

Additionally, we have studied **secondary pieces of research and plans** including demographic data, The Hartford Performs Plan and numerous national and **global models** for symphonic community service and audience development.

B. Findings: Assets

- Music Director Carolyn Kuan
- Orchestra has excellent players, some of which are dedicated to community service.
- Board members have stood firm and consistently recommitted to the necessity of Hartford having its own symphony. They deserve high praise.
- Hartford has a strong history of philanthropy and public policy.
- Hartford also has a strong cultural infrastructure of diverse arts, cultural and education experts and providers.

C. Findings: Deficits

- Core programs (Discovery Concerts, SISE, and Instrument Petting Zoo) are “out-of-date,” “unaccountable” and “unresponsive to school, family and community needs” and need major reconstruction.
- CityMusic “suspension” is an indicator of a lack of planning and relationship building with school leadership, faculty and parents.

D. Findings: Community and Family Needs

- HSO as “disappointing” community partner
- Desire for HSO in community venues, houses of faith, Spanish-speaking programs, diversity efforts and more engaging music
- Keen interest in family concerts and services

E. Findings: Student, Teacher and School Needs

- Direct music instruction and instruments for those who cannot afford lessons
- Master classes and sectionals for middle high school students
- Diversity learning through and about music
- Professional development (PD) /training for musicians who work with students
- PD for participating teachers
- Musicians as mentors

F. Recommendations:

**BIG IDEA: Placing HSO at the Service of the Community**  
**The Comprehensive HSO Family Music Academy**  
Music for Families, Schools, Young Adults, Life-Long Learners and Healing

**Need:** The HSO must reclaim its education value and mantel, and create a highly visible small group of laboratory schools and community sites that receive the totality of this program menu.

The Academy becomes the center of HSO programs and the means of comprehensively reaching families, serving schools, building young adult audiences and serving lifelong learners and music as healing.

1. Mission: Create a new mission for education and community engagement – “Music in Service to the Community” which seeks to meet the needs authenticated in this study.

2. Convener: Promote community dialogue and raise visibility of HSO education efforts by convening dedicated music education providers, experts and funders.
3. Family Concerts, which respond to real topics and interests of families, should be presented at The Bushnell and in a variety of community settings. These concerts – and other school programs – could be enhanced by a re-constructed and improved Petting Zoo program.
4. School Presentations: Discovery Concerts and School Ensembles in the schools should coordinate with school needs, link to literacy and common core concepts, utilize more visual content and be strengthened by mandatory professional development for musicians working in the schools.
5. Middle and High School program: HSO players are needed for instrument master classes, sectionals and small group instruction in technique and upcoming performance repertoire preparation. Link these services to ticket program discounts to encourage young musicians to attend HSO events.
6. Talent Development: The above need is especially important to the development of gifted, committed young musicians in the schools. Explore performance opportunities with the HSO as well as competitions and awards programs.
7. Other Young Adults: Provide young adults classical and other quality music experiences in the unique venue and social environment they crave.
8. Life Long Learning: Explore partnerships with residential and other senior organizations, and houses of faith to launch a symphony 101 life-long learning series.
9. Healing: Working with pertinent professional organizations, develop music programs of healing for victims of Alzheimer's, concussion disorders, sex abuse, post-traumatic stress disorder, refugees, etc.
10. Digital HSO: Website Technologies  
Develop a dedicated education and community engagement website, which becomes the digital menu for each initiative described. It is also an HSO archive of events, a site for live streaming of concerts and a vehicle for real-time music discussion, performances, master classes and workshops.

Community partnerships - - which address real needs and are based on authentic engagements - - will continue to heighten HSO's visibility and stature as well as enable it to discover new audiences and patrons.

**Challenge 3: Revenue**  
**Leading Thoughts on HSO Finances and Support**

Two major realities on HSO Finances need to be squarely addressed:

1. Time is of the essence. The HSO is in a race against time in its quest for financial stabilization. To survive, withdrawals of over \$4 million from HSO's endowment have been required over the past five years. Despite good investment results, the HSO's modest endowment of \$ 8.5 million is only \$2.1 away from hitting its "uninvaded-able" permanent corpus of \$4.2 million (\$2 million being required to pay off a \$2 million letter of credit). Compounding the challenge, HSO's operating gap of over \$1.3 million will no longer be significantly reduced by "emergency" contributions – provided by 1 or 2 enormously generous donors who have enabled the Symphony's survival for over a decade.
2. The current business model is unsustainable. "Business as usual" will be fatal and incremental changes will not suffice to solve the problem.

**BIG IDEA: Adopting a New Business Model**  
Zero-Based Budgeting for Growth

An entirely new business model which comprehensively reconceives the expense and revenue structure of the organization is needed. In the new business model, a special emphasis will be placed on a responsible and responsive approach to new revenue generation:

Earned Revenue

- Net margins on current programming are targeted for increases through cited marketing, pricing recommendations, and most importantly, through improvements to program presentation and customer experience.
- New programming, which offers reasonable expectation for revenue, audience growth and "lifetime patron" value will be launched.
- Alternative Revenues, such as the proposed Digital Institute's income from licensed projects, royalty revenues, and commercial rental fees will be identified and aggressively pursued.

All programming decisions - - both in stage and community programming - - will be evaluated on a zero-based budgeting premise, to which disciplined pricing, attendance and funding metrics are applied - - prior to launch. An Investment Fund, of a minimum of \$1 million, should be targeted to encourage innovation and entrepreneurialism.

Contributed Revenue

Development efforts will benefit from the proposed "patron-centric" operating model, as well as new programming which will be available for corporate and foundation support, re-branding and a concomitant communications program, which will include a dynamic "case for support".

In addition, government funding - - in the form of a State of Connecticut budget line item and/or dedicated tax revenue should be pursued to provide a significant increase in HSO's annual operating support.

In draft 5-year revenue projections, new revenue - - both earned and contributed sources, exclusive of any new state funding, is projected at a minimum of \$1.8 million. Although significant, these new

revenues are "back-loaded" and do not fully "bridge the gap". Among other strategies, further strengthening the HSO's capital base will be a priority.

**BIG IDEA: Laying the Groundwork for a Secure Future**  
A Comprehensive Capital Development Plan

When this strategic framework is endorsed and correlative updated 10-year Financial Projections are completed; a comprehensive capital development plan will be created which will detail:

1. A Capital Campaign, to supplement stabilization funding secured in the High Note Campaign. This campaign will benefit from being based on a new vision, a comprehensive strategic plan and specific endowment requirements.
2. A formal Planned Giving Program to be launched and strategically integrated into the capital campaign.

A cautionary note: Contrary to the deeply flawed 2013 Feasibility Study, a high 7 or 8-figure capital campaign will be enormously challenging, a fact that been born out of a thorough analysis of HSO's donorship. Minimal cultivation, limited staff and Board resource, virtual absence of any personal face-to-face solicitation over the past several years, combine to result in a very "shallow" major prospect pool. Most of HSO's affluent prospects are vastly under cultivated, and are not currently well-positioned to consider maximum gifts to either the Symphony's annual fund or capital gift fund programs. A great deal of work and a high-functioning partnership between Staff and a strengthened, fundraising-oriented Board are required to maximize contributed revenues over the next five years.

**Challenge 5: Human Resources**  
Leading Thoughts on HR Requirements and Culture

An assessment of human resources required to implement this plan revealed the following:

Board Requirements: Over the past 12 months, many Board reforms and improvements have been made. First and foremost, strong future leadership has been identified. Jeff Verney - - highly respected by Board, staff and the wider community - - has agreed to assume the Chair in September. Second, a strengthened nominations process has resulted in several extremely high-level Director appointments and, in all ways; the Governance Committee is committed to building a stronger Board - - well-suited and well-trained for the fundraising and other important initiatives of the future. (A top priority and critical success factor).

Artistic Leadership and Musicians: Our Conductor's artistic vision, continuity and commitment are essential to this plan - - and are now assured by the six-year contract with Maestra Carolyn Kuan. As importantly, HSO musicians are clearly key to the fulfillment of this plan, but owing to current contract negotiations, no further comment will be made.

Staff Requirements: This plan's implementation will require the recruitment of several new full and part-time staff with requisite competencies, selective training initiatives and a limited restructuring of reports. (All new expenses have been calculated into the new net revenue projections.)

**The Most Important Strategic Imperative for HSO:**  
Reform and Re-Imagine its Organizational Culture

The best plans and best intentions to re-invigorate the HSO will be foiled without significant remediation of its organizational culture. The cultural dysfunction, which has seismically fractured and partially paralyzed the organization for years, must be addressed. Concerns have been voiced by Board, staff and musicians alike; frustrations run high. The Strategic Planning committee posits that "job #1" is recreating HSO's organizational culture and identifying means to effect the following cultural shifts:

Focus on the past	➔	Focus on the future
Culture of scarcity and despair	➔	Culture of hope and optimism for growth
Negativity	➔	Positivity: True belief that we can and will succeed
Distrust	➔	Transparency Open & frequent communication Spirit of partnership & Trust
Purist/Elitist Judgmental	➔	"catholic" Tolerant
Silo-ed & adversarial constituents (board, staff, musicians, Bushnell, conductor, etc.)	➔	Unity Alignment Collaboration

**BIG IDEA: Creating a Culture of Shared Responsibility and Shared Opportunity**  
A New Paradigm for Constituent Relations

Board Leadership, the Artistic Director, musicians, the CEO and staff leaders must forge a new partnership which re-shapes the culture, rearticulates its aspirations and enables HSO to tap into their collective artistic, intellectual and social capital - - every bit of which is essential to its future well-being.

How to do this is a challenge in itself. Fortunately, HSO is not alone in its requirements for re-invention. Orchestras across the country are experimenting and developing new cultures and operating models. There are many instructive examples to be studied, including:

Atlanta Symphony Orchestra has adopted a cross-constituent organizational model that has resulted in new found synergies. A culture of “blame” and “good enough” has been replaced by new standard for execution and a strong focus on continuous improvement.

St. Paul Chamber Orchestra changed its artistic leadership model vesting more decision-making in musicians, and substantially altering its systems and culture.

Memphis Symphony Orchestra embraced a community focus, expanded the role of musicians and developing a model for “artistic citizenship” which taps into the many talents of its orchestra members. This has resulted in unprecedented community support and a new level of artistic excellence.

The Detroit Symphony and others have embraced entrepreneurial cultures through which musicians are encouraged to actively pursue independent projects under the umbrella brand of their Symphony. These projects serve to diversify the Orchestra's portfolio of music-related programs and broaden its visibility within new and existing markets.

The Committee recommendations:

1. Establishing a Task Force, composed of selected members of each HSO constituent group, charged with:
  - a. Developing recommendations on the improvement of current organizational culture
  - b. Reviewing and evaluating the alternative models of constituent participation.
2. Support the Task force work and the ensuing plan for cultural transformation, with change management expertise and counsel.

### Conclusion:

This plan represents a radical departure from some of HSO's historical aspirations and behaviors; and reaching for it will require a fundamentally greater and more sustained commitment toward HSO's envisioned future than ever before. It will require a zealous belief in the potential of HSO's future. It will also require much deeper self-reflection and willingness to change than ever before. It will require HSO to do different things, do things differently and take new risks. It will require transformational leadership from all constituent groups and transformational funding from core supporters and the wider community.

The HSO Strategic Planning Committee firmly believes that this plan represents a vision achievable over 10-15 years. However, in order to succeed, we must all believe passionately in the vision and its achievability. Do we? And do we have the will to do it? If so, let's charge ahead and work toward making the HSO America's premier regional orchestra.

## Appendix 1: **New Programming Directions: On Stage at the Concert Hall**

### Traditional Programming:

**New World Symphony.** The leader in reimagining the concert hall experience by collaborating with video artists to create an immersive, multi-sensory arrangements. ([www.nws.edu](http://www.nws.edu))

- PULSE
- Soundwall
- Mini-Concerts

**Los Angeles Philharmonic.** Next season, they will introduce in/SIGHT, a new series featuring video works set to orchestral and choral pieces.

**Berlin Philharmonic.** Their impressive Digital Concert Hall offers concert subscriptions to fans around the world—generating profile and significant new revenues. ([www.digitalconcerthall.com](http://www.digitalconcerthall.com))

**St. Paul's Chamber.** Sony “Bird’s-Eye” Camera zooms in on player’s faces and hands.

**Chicago Symphony.** “Beyond the Score” productions on composers, “Truth to Power” and other multi-sensor music series. ([www.cso.org](http://www.cso.org))

**Boston Symphony Pops.** “Pops on the Edge;” Jeux Deux Project/MIT Media Lab and BSO collaborate to create an acclaimed mixed-media digital experience. Tod Machover at [www.web.media.mit.edu](http://www.web.media.mit.edu)

**Aspen Music Festival.** “Concert-Companions” (coco) are handheld devices, which provide information and amplify what is being seen and heard on stage.

**Seattle Symphony.** Soundbridge and interactive on-site family museum to encourage discovery and early involvement in symphonic music.

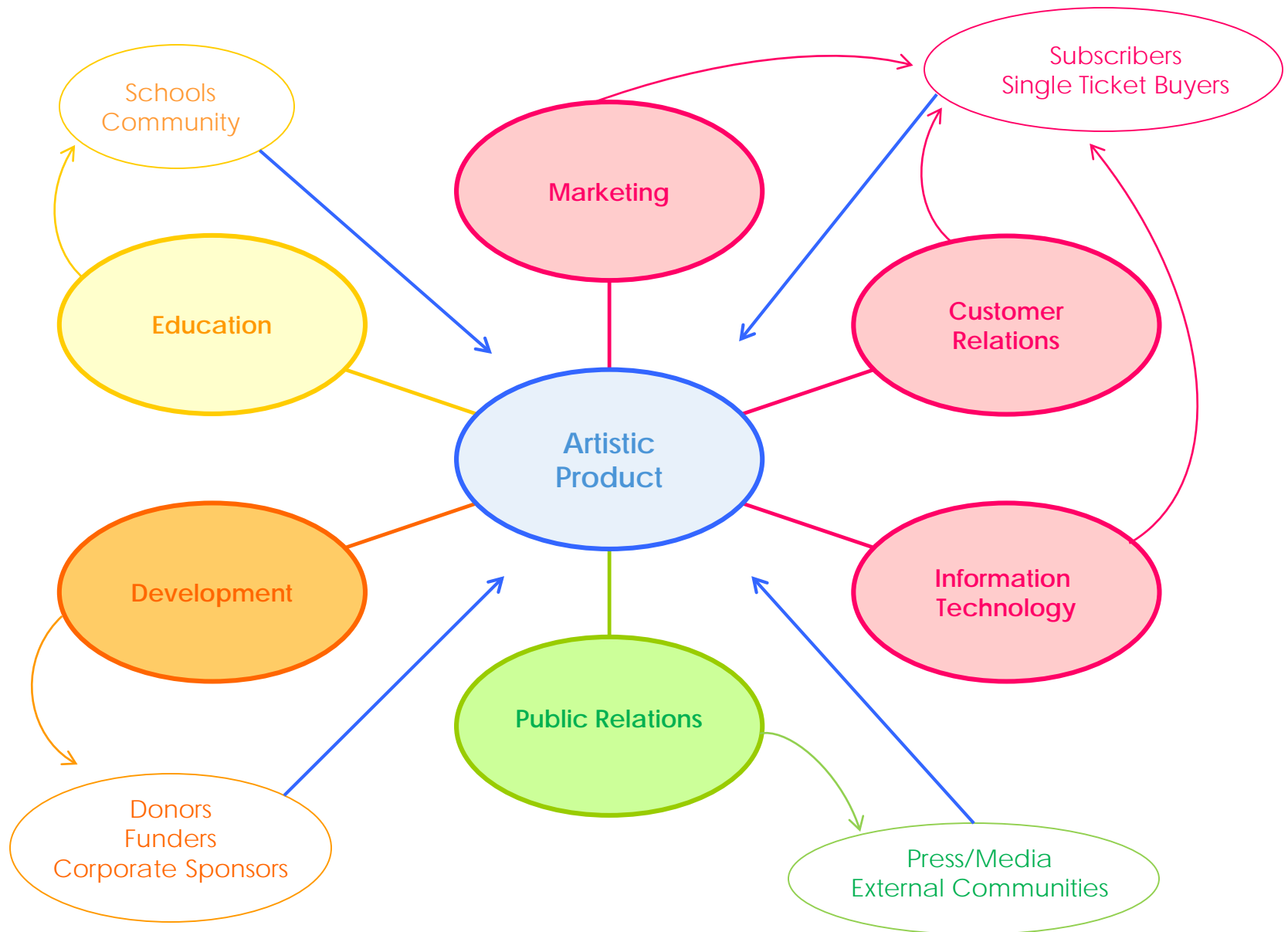
### **University of Michigan's Music Series**

[UMS Lobby](#) website develops and engages a community of like-minded followers.

**London Symphony Orchestra** – separate website for educators:  
<http://lso.co.uk/lso-discovery>

These enlightened orchestras feel that we must reverse the tide: the tsunami of technology has only not only massively altered the creation and distribution of the arts, but also triggered a seismic shift in leisure patterns—increasingly away from traditional concert arts. Today, the symphonic world must embrace new technologies and acknowledge their vast potential in developing their audiences—and as importantly the new revenue streams—of the future.





# Alternative Orchestra Operating Model

Patrons at core with orchestras structured to build closeness, connections, and partnerships

