

## **UMS Strategic Plan (Final): 2016-2019**

*Affirming our position as a national leader in the arts*

*[The UMS Strategic Plan 2016-2019 was adopted by the UMS Board of Directors  
at the January 26, 2016 meeting]*

Table of Contents

**Introduction** ..... 3

**Executive summary** ..... 4

**Goals and objectives**..... 5

**Goal 1 Connecting Artists and Audiences through Performances and Learning Experiences**..... 5

    Objective 1.1: Continue innovative programming and risk-taking..... 5

    Objective 1.2: Develop a shared vision for Education and Community Engagement..... 5

**Goal 2 UMS Identity and Communications** ..... 5

    Objective 2.1: Leverage the UMS brand locally, regionally, and nationally ..... 6

**Goal 3 U-M/UMS Institutional Relationship** ..... 6

    Objective 3.1: Engage U-M in early discussions around venue renovations..... 7

**Goal 4 Organizational Excellence** ..... 8

    Objective 4.1: Design and execute a thoughtful succession plan..... 8

    Objective 4.2: Develop means for staff co-location..... 8

    Objective 4.3: Increase diversity across the UMS enterprise ..... 8

**Goal 5 Financial Strength and Stability** ..... 10

    Objective 5.1: Successfully complete the endowment and operating campaigns..... 10

    Objective 5.2: Articulate the desired outcomes for the National Council..... 10

**Goal 6 Leadership in the Arts**..... 10

    Objective 6.1: Assemble a powerhouse Venue Exploration Team ..... 11

**Concluding remarks** ..... 12

**Appendix** ..... 13

    Existing and updated strategic plans in summary table format..... 13

## Introduction

The University Musical Society (UMS) published a strategic plan in 2010 that defined the organization's work over a five-year term ending in 2015. Supported by an external consultant, the process of developing that plan began in 2009 and spanned 18 months, during which time dozens of stakeholders were engaged through focus groups and individual interviews, and volumes of data were gathered and analyzed. The process culminated in a daylong retreat in which the UMS Board of Directors and management team made meaning of the findings and distilled the plan's strategic goals into final form.

In the following years, UMS pursued and successfully achieved a significant majority of the objectives set forth within the 2010 strategic plan. As the closure of that plan's term approached, UMS Board leadership and staff reflected on the contents and recognized that the essential framework of the plan remains durable and relevant. In fact, to the great credit of both the plan and UMS as an organization, much of what was considered "strategic" about the plan has become operationalized.

At the same time, UMS arrived at a critical crossroads in the organization's history, with the current President – who, during his 28+ year tenure with the organization, has become an established force who is well-known and loved both in the community and on the national stage – beginning to consider the need for a thoughtful leadership succession plan.

Reflective both of the durability of the existing strategic plan and this transitional time in the organization's history, UMS determined to engage in a streamlined process of updating – rather than overhauling – the existing strategic plan. The desired outcome of this process was to draw on the collective wisdom of the UMS Board of Directors and staff to sharpen the near-term focus of the organization in affirming the position of UMS as a national leader in the performing arts. Accordingly, this updated plan articulates a manageable set of objectives that deserve particular attention over the next three years.

Mindful that the upcoming succession planning process would require significant investment from the organization, UMS diligently contained this updated strategic plan's focus areas to the most important and necessary to advance the organization. Further, UMS gave careful thought to the staging sequence of these focus areas so as to (1) avoid overtaxing the organization's capacity to execute on these strategic objectives amidst the ongoing demands of day-to-day operations, and (2) offer some degree of flexibility such that the new President will have the opportunity to shape the way these objectives unfold.

## Executive summary

### *Process*

In partnership with Bridgeport Consulting, a Design Team comprised of the UMS management team and three staff members guided the process – and helped to shape the content – of the strategic plan update. A full-day all-staff retreat was held in June 2015 to invite collaboration and surface ideas to inform the strategic plan’s development; in October 2015, a full-day retreat was held with the Board of Directors to build a shared understanding of the emerging strategic plan contents, and engage the Board’s best thinking in order to add depth and assign early action steps to the focus areas.

### *Stable framework*

UMS’s vision, mission, and core values remain intact.

- Vision: To foster a culture of creativity that transforms the human condition
- Mission: To inspire individuals and enrich communities by connecting audiences and artists in uncommon and engaging experiences
- Core values: Inclusiveness; Respect and Transparency; Innovation and Tradition; Participation and Collaboration; Leadership and Stewardship

Similarly, the overarching framework that organizes this updated version of the strategic plan continues the construct of the 2010 plan, which defined six strategic goal categories:

- Goal 1. Connecting Artists and Audiences *through Performances and Learning Experiences*
- Goal 2. UMS Identity and Communications
- Goal 3. U-M/UMS Institutional Relationship
- Goal 4. Organizational Excellence
- Goal 5. Financial Strength and Stability
- Goal 6. Leadership in the Arts

### *Updated content*

The only change to the pre-existing framework is the addition of “through performances and learning experiences” to the first goal category. This addition reflects both the growing importance of UMS’s role in the academic enterprise (at all levels) and the identity of today’s audiences, many of whom are hungry for opportunities to make meaning of the arts experience, supported by the tools and perspective that UMS can provide.

Within each goal category, a set of objectives was articulated. These objectives represent the focus areas deserving of particular attention from the organization in the near term, and are listed in priority order within each goal category. The following section provides a brief narrative explanation of the goals (intact from the 2010 plan) and objectives (new for 2016).

## Goals and objectives

### Goal 1 Connecting Artists and Audiences through Performances and Learning Experiences

*UMS interacts with audiences and artists in sustained and meaningful ways, to inspire and be inspired through the power of live artistic expression that we experience together.*

#### Objective 1.1: Continue innovative programming and risk-taking

UMS takes pride in delivering programming that challenges audiences, confronts conventional wisdom, and pushes boundaries. This type of programming – whether an audacious orchestral residency or an experimental Renegade presentation – has become an integral part of the organization’s identity, the delivery of which could be considered a largely operational concern. Nonetheless, reflective of the core commitment to innovation, UMS determined to retain and articulate this objective in the updated strategic plan.

✂ **Action step: Continue to cultivate audience appetite for innovative programming across disciplinary lines.**

- *Champions: Director of Programming (Michael Kondziolka), Board and/or Senate member(s) to be named*

#### Objective 1.2: Develop a shared vision for Education and Community Engagement

The role of UMS in the academic enterprise is both deep and broad, and has grown significantly over time. Starting in the 1990s, UMS launched a robust K-12 program that translated adult performances into an abbreviated version suitable for a school-day experience and supported by curricular materials for participating educators. In parallel, UMS deliberately cultivated relationships of varying depth and focus with dozens of other organizations, representing a diversity of interests around arts, education, and cultural communities. UMS’s partnership with the University of Michigan also blossomed during this time, culminating in the 2013 award of a prestigious Mellon grant that continues presently and is focused on arts and academic integration in the undergraduate classroom.

Simultaneously, UMS delivers programming that is accessible to the entire community – for example, by providing opportunities for multigenerational, no-experience-needed dance and movement classes through the YMCA. Given this proliferation of activity, it is time to coalesce around a shared vision for UMS’s role in Education and Community Engagement, and define the operational implications of this vision.

✂ **Action step: In the first half of 2016, UMS will engage stakeholders, staff, and the Board of Directors in creating a shared vision for Education and Community Engagement.**

- *Champions: Director of Education and Community Engagement (Jim Leija), Board member Mark Clague, and other Board and/or Senate member(s) to be named*

### Goal 2 UMS Identity and Communications

*UMS’s success and sustainability require that our audiences, professional colleagues, artists, and partners know who we are, what we do, and how we do it.*

**Objective 2.1: Leverage the UMS brand locally, regionally, and nationally**

UMS has a multitude of interesting and fabulous stories to tell. From the organization's historic role as a presenter of distinctive and unique international art making, to building the field of artistic leadership through the UMS internship program; from facilitating eye-opening (and, arguably, life-changing) experiences in performance spaces, classrooms, and beyond, to elevating Ann Arbor as a performance destination rivaling major coastal cities – these stories deserve to be told. As a result of the 2010 strategic plan, UMS clarified its visual identity and unified its messaging. Recently, the organization also developed a plan to regularly review and update its digital engagement tools to ensure these remain fresh and relevant over time. UMS also continues to pursue thoughtful co-branding opportunities with the University of Michigan that emphasize the organizations' strong partnership and leverage their unique – and uniquely appealing – identities.

Upon this foundation, this new objective recognizes the current importance of extracting, documenting, and sharing the organization's stories to elevate the visibility of UMS locally in the Ann Arbor area, regionally within Michigan and across the Midwest, and at the national level as well. In order to do so, UMS recognizes the value of engaging a third-party publicist with connections to the national arts community and respected media outlets.

In tandem, the UMS Board of Directors and staff recognize the continuing strategic importance of technology in advancing the organization. UMS aims to embrace the myriad opportunities that technology presents in engaging audiences in a more multifaceted and fulsome way, which may result in the creation of a new position within UMS that is charged with leading this work on an ongoing basis.

**✂ Action step: Engage a national publicist to elevate the presence and visibility of UMS**

- *Champions: UMS President (Ken Fischer), Director of Marketing & Communications (Sara Billmann), Director of Development (Marnie Reid), and Board and/or Senate member(s) to be named*

**✂ Action step: Establish and staff a Board committee to explore strategic technology opportunities.**

- *Champions: Director of Administration and Finance (John Kennard), Director of Marketing & Communications (Sara Billmann), Senior Manager of Digital Media (Anna Prushinskaya), Information Systems Manager (John Peckham), Director of Education and Community Engagement (Jim Leija), and Board and/or Senate member(s) to be named*

**Goal 3 U-M/UMS Institutional Relationship**

*UMS holds a unique status among its University peers, as a 501(c)3 not-for-profit organization with a self-governing fiduciary board closely affiliated with the University of Michigan (U-M). Maintaining this unique status is of significant value both to UMS and U-M and is widely acknowledged to be an ideal structure, which others now seek to replicate.*

**Objective 3.1: Engage U-M in early discussions around venue renovations**

The University of Michigan and UMS have recently codified the organizations' multifaceted, mutually beneficial relationship in an official, detailed Memorandum of Understanding that took several years to finalize. UMS celebrates this accomplishment, and now proposes to build on this foundation and engage its trusted partner in visioning for the future.

Chief among future interests are the performance spaces in which UMS presents work. UMS does not own any facilities, which is largely considered to be a strength that reflects the organization's strong partnership with the University of Michigan. Nonetheless, the performance spaces – namely, Hill Auditorium and the Power Center – in which UMS currently presents artists' work, are increasingly challenged with limitations.

Today's artists who are engaging in cutting-edge performances and/or advancing artistic research projects require more adaptive, technology-supportive spaces in which to present their work. Further, UMS longs for performance space that will accommodate social and education activities, food and drink, backstage amenities, and perhaps even "maker" space where artists and audiences could co-create. This objective seeks to determine whether some of these attributes could be realized through the major renovation of an existing venue.

✂ **Action step: Engage a core of U-M leaders to begin defining interests and appetite around renovating an existing venue to reflect the needs of 21<sup>st</sup> century performances.**

- *Champions: UMS President (Ken Fischer), Director of Administration and Finance (John Kennard), Director of Programming (Michael Kondziolka), Chair of the Board (Steve Forrest), and Board members (Aaron Dworkin and other(s) to be named)*

**Goal 4 Organizational Excellence**

*UMS is widely regarded as an excellent artistic organization. That excellence is derived in part by the people associated with the organization: staff, Board, volunteers, and partners. To uphold that reputation, UMS wishes to provide appropriate opportunities for staff to grow and to continually evaluate and define opportunities for organizational improvement.*

**Objective 4.1: Design and execute a thoughtful succession plan**

First and foremost, UMS is cognizant of the significant organizational capacity that will be devoted to securing the next President of the organization. A diverse and representative search committee has been convened, and a communication plan is being developed to maintain robust connection with UMS stakeholders as the process unfolds. UMS aims to announce the succession process in winter 2016 and identify the new President no later than December 2016.

✦ **Action step: Announce and launch the search process.**

- *Champions: UMS President (Ken Fischer), Chair of the Board (Steve Forrest)*

**Objective 4.2: Develop means for staff co-location**

The venue conversation discussed in Goals 3 and 6 will require time to get organized and gain momentum. In the meantime, a sense of urgency has developed around discovering a way to co-locate UMS staff – currently distributed among three separate office settings – in order to realize the practical efficiencies and cultural benefits of proximity. It must be noted that when co-location was explored previously, the associated costs were found to be prohibitive. The financial implications of co-location will certainly need to be considered carefully this time as well; nonetheless, the topic deserves re-examination.

Meanwhile, UMS will also attend to ongoing opportunities to improve the organizational culture. In specific, UMS commits to creating consistent expectations with regard to flex schedules and exploring the possibility of extended leaves of absence for staff – while, of course, complying with the University of Michigan HR guidelines within which the organization operates – and continuing to promote a sense of community within UMS.

✦ **Action step: Identify the specific organizational requirements for staff co-location (square footage needs, proximity to presenting venues, etc.) and associated budgetary implications.**

- *Champions: Director of Administration and Finance (John Kennard) and Board and/or Senate member(s) to be named*

**Objective 4.3: Increase diversity across the UMS enterprise**

UMS has made tremendous strides in terms of programmatic diversity – in part, through the deliberate cultivation of meaningful relationships with organizations and people representing different cultures of shared heritage. With the same humility and vulnerability that have marked the programmatic expansion, UMS now proposes to attend to increasing the diversity represented within our own organization.

To this end, UMS has appointed a Planning Lead to participate in the U-M Diversity, Equity & Inclusion Planning Initiative. The Initiative is designed to result in a goal oriented five-year plan for diversity, equity and inclusion covering key constituents. For UMS, these include audiences, participants in educational initiatives, student interns, staff, and Board of Directors.

✧ **Action step: Through participation in the U-M Diversity, Equity & Inclusion Planning Initiative, develop a five-year plan to increase diversity across the UMS enterprise.**

- *Champions: Ticket Services Manager (Christina Bellows) and Board and/or Senate member(s) to be named*

**Goal 5 Financial Strength and Stability**

*UMS's financial health must be preserved and strengthened.*

**Objective 5.1: Successfully complete the endowment and operating campaigns**

In strong partnership with the University of Michigan's "Victors for Michigan" campaign, UMS staff and Board are working tirelessly – and with resounding early success – to fulfill a bold \$50 million campaign. Of that goal, a target of \$30 million in endowment funding will provide the desired outcome of a diversified and stable foundation from which UMS can continue to innovate and educate long into the future.

In addition, UMS has recently received positive indications that sustaining support for both the Renegade program and the Mellon Initiative is likely forthcoming. This support is crucial to the continuance of UMS's risk-taking and innovation as well as the organization's significant role in integrating arts with the undergraduate academic enterprise at U-M.

Similarly, the effort to ensure ongoing funding for the UMS orchestral residencies is solidly on track. These initiatives and current successes enable the UMS Development team to focus their attention and organizational resources to achieving the overarching \$50 million campaign goal by calendar year-end 2018.

✧ **Action steps: Broaden regional engagement to identify new major gift prospects and secure support; engage University leadership to help fundraise on UMS's behalf; and continue to secure gift commitments from long-time UMS patrons.**

- *Champions: UMS President (Ken Fischer), Director of Development (Marnie Reid), Campaign Director (Mary Walker), and Board and/or Senate member(s) to be named*

**Objective 5.2: Articulate the desired outcomes for the National Council**

National Council members provide areas of expertise either as arts patrons or practitioners, and represent a spectrum of age, race, and gender. Their role as ambassadors and advocates for UMS is to heighten the importance of the arts at U-M.

✧ **Action step: Promote more active engagement with National Council members between meetings.**

- *Champions: Director of Development (Marnie Reid) and Board and/or Senate member(s) to be named*

**Goal 6 Leadership in the Arts**

*UMS believes that, in addition to being distinctive in our artistic and educational programming, we must serve the artistic and civic communities in which we work, at the local, regional, national, and international levels. As an organization, UMS values service, knowledge sharing, and experience as attributes of good leadership.*

**Objective 6.1: Assemble a powerhouse Venue Exploration Team**

Many voices, representing multiple sectors of the local community, have added volume to the refrain of needing more capacity with regard to performance spaces in the Ann Arbor area. In addition to the discussion with the University of Michigan referenced in Goal 3 that focuses on the renovation of existing performance spaces, UMS seeks to leverage its credibility, expertise, and relationships to help advance the community's interest in creating more options for performance spaces in our community.

The possibilities here are wide open: perhaps the renovation of existing performance space(s) that UMS currently utilizes will address some of these needs; perhaps the creation of a flexible, black-box space equally accessible to UMS and other partners is warranted; perhaps a UMS signature venue will emerge as a viable option. Regardless of the outcome, UMS seeks to convene and lead the broader conversation that is beginning to unfold around this topic. It is not the intention of UMS to own such a facility itself.

To that end, UMS proposes to assemble a powerhouse team of UMS partners and advocates alongside community leaders to explore the possibility of a signature venue that would meet the needs of UMS, honor the organization's partnership with U-M, support artists' presenting needs, and serve the interests of the entire community.

- ✦ **Action step: Reach out to community leaders who have expressed interest in creating a performance space, and convene a Venue Exploration Team.**
  - *Champions: Staff and Board and/or Senate member(s) to be named*

## Concluding remarks

This moment in UMS's history is one of incredible possibility. UMS was awarded the National Medal of Arts in fall 2015 – the first University-based performing arts presenting organizations ever to do so. The Memorandum of Understanding with the University of Michigan is now in place, providing welcome clarity and establishing a sense of security and stability to both partners. The operating and endowment campaigns are roaring along, and the nascent succession planning efforts has resulted in greater cohesion and reflection among the Board and staff. In short, UMS has never been in better standing.

This updated strategic plan, then, seeks to build on these successes and provide directional focus without unduly taxing the organization's capacity. The key principle that guided the thoughtful – and, at times, excruciatingly difficult – winnowing of the many ideas generated through multiple conversations was the driving need to name a manageable set of important objectives, to which could be attached clear, achievable initial actions necessary to advance the organization over the near-term. UMS celebrates the adoption of this updated strategic plan with the cheerful understanding that our efforts could and should render the contents obsolete within a matter of three years.

## Appendix

### Existing and updated strategic plans in summary table format

<b>Existing Goals and Objectives:</b> <i>As published in 2010; many of these continue to guide our work</i>	<b>Updated Goals and Objectives:</b> <i>These items represent areas deserving of particular focus over the next three years</i>
<b>Connecting Artists &amp; Audiences</b> <ul style="list-style-type: none"> <li>▪ Innovative Programming &amp; Risk Taking</li> <li>▪ Priority Audiences</li> <li>▪ New Connections</li> </ul>	<b>Goal 1: Connecting Artists &amp; Audiences through Performances and Learning Experiences</b> <ul style="list-style-type: none"> <li>1.1 Continue innovative programming and risk-taking</li> <li>1.2 Develop a shared vision for Education and Community Engagement</li> </ul>
<b>Goal 2: UMS Identity &amp; Communications</b> <ul style="list-style-type: none"> <li>▪ Organizational Identity</li> <li>▪ Identity Management &amp; Communications</li> </ul>	<b>Goal 2: UMS Identity &amp; Communication</b> <ul style="list-style-type: none"> <li>2.1 Leverage the UMS brand locally, regionally, and nationally</li> </ul>
<b>U-M/UMS Institutional Relationship</b> <ul style="list-style-type: none"> <li>▪ Increase U-M Participation in UMS Activities</li> <li>▪ Increase UMS Participation in U-M Activities</li> <li>▪ Capital Programs &amp; Maintenance</li> </ul>	<b>Goal 3: U-M/UMS Institutional Relationship</b> <ul style="list-style-type: none"> <li>3.1 Engage U-M in early discussions around venue renovations</li> </ul>
<b>Organizational Excellence</b> <ul style="list-style-type: none"> <li>▪ Work Environment</li> <li>▪ Organizational Structure</li> <li>▪ Professional Growth</li> <li>▪ Volunteers</li> <li>▪ Strategic Alliances</li> </ul>	<b>Goal 4: Organizational Excellence</b> <ul style="list-style-type: none"> <li>4.1 Design and execute a thoughtful succession plan</li> <li>4.2 Develop means for intermediate staff co-location</li> <li>4.3 Increase diversity across the UMS enterprise</li> </ul>
<b>Financial Strength &amp; Stability</b> <ul style="list-style-type: none"> <li>▪ Operating Funds</li> <li>▪ Endowment Funds</li> <li>▪ Transformative Gifts</li> <li>▪ Joint UMS/U-M Fundraising Effort</li> <li>▪ Loyalty and Retention of Ticket Buyers and Donors</li> </ul>	<b>Goal 5: Financial Strength &amp; Stability</b> <ul style="list-style-type: none"> <li>5.1 Successfully complete the endowment and operating campaigns</li> <li>5.2 Articulate the desired outcomes for the National Council</li> </ul>

<p><b>Existing Goals and Objectives:</b>  <i>As published in 2010; many of these continue to guide our work</i></p>	<p><b>Updated Goals and Objectives:</b>  <i>These items represent areas deserving of particular focus over the next three years</i></p>
<p><b>Leadership in the Arts</b></p> <ul style="list-style-type: none"> <li>▪ Service to the Field</li> <li>▪ Advocacy</li> <li>▪ Civic Engagement</li> </ul>	<p><b>Goal 6: Leadership in the Arts</b></p> <p>6.1 Assemble a powerhouse Venue Exploration Team</p>