



Strategic Roadmap Draft

January 2019

Mission

To inspire individuals and enrich communities by connecting audiences and artists in uncommon and engaging experiences

Vision

To foster a culture of creativity that transforms the human condition

Vision for UMS@150

New vision for 150 years at University Musical Society at the University of Michigan (2029)

UMS is recognized as a leading world-class, innovative, and risk-taking arts presenter, producer, and educator – engaging artists, students, and audiences locally, regionally, nationally, and internationally

- Advance our organization as an inclusive, collaborative, and catalytic centerpiece for the arts at the University of Michigan – with a transformational ‘home’ facility and “Arts Accelerator”
- Create an atmosphere for emerging artists and students to thrive and create, fostering the next generation of visionary, cutting-edge arts producers and performers
- Enable collaboration among with the world’s finest artists, students, and faculty at U-M, solidifying its position as the leader in university-affiliated performing arts organizations
- Embrace our role in giving artistic voice to pressing cultural and social issues through provocative and experimental approaches, programming and contextual learning
- Lead educational and community programming for the arts, expanding the bounds and aspirations of the roles of a performing arts organization
- Build and challenge our intellectual community of artistic thought leaders
- Ensure a sustainable, well-capitalized and financially dynamic organization in order to support the vision

Strategic Roadmap Focus Areas:

1. Artistic, Educational & Creative Platform
2. Brand
3. Geography, Impact & Access
4. Diversity, Equity & Inclusion
5. Real Estate & Facilities
6. Financial & Fundraising

Refer also to the 2016-2019 UMS Strategic Plan in Appendix 1.

Artistic, Educational & Creative Platform

GOAL:

Analyze, assess, and focus our artistic portfolios toward continued evolution, expansion, and refinement; align operational and financial structure more fully with artistic priorities and with existing Education and Community Engagement (“ECE”) strategic planning

- Ensure artistic and educational offerings remain meaningful in the local, regional, national, and international arts ecology
- Align activities to and help define our current and/or new brand
- Identify business, entrepreneurial and university-aligned opportunities related to the programming and producing we offer
- Cultivate major artistic partners and artists with whom UMS can offer major residencies, co-curation opportunities, and development of new work
- Create a more transparent curation process for staff and stakeholders, especially around work which touches on current events and/or identity
- Develop strategic fundraising ideas with Development to support the full portfolio and new directions, content richness; commissioning, and producing mandate moving forward

Refer also to the 2017-2020 Education & Community Engagement Department Work Plan, in Appendix 2.

ARTISTIC PROGRAMMING FOCUS AREAS AND PRIORITIES:

- Partnering with major companies for residency projects (Berlin Philharmonic, Philadelphia/ Nézet-Séguin, LA Phil/Dudamel, LSO/Rattle, RSC, others)
- Major artist relationships leading to presentation of distinctive exiting work; creation and/or producing new work, co-commissions, world-premieres, etc.
- RENEGADE Artist-in-Residence model; artist-curated element to existing season
- Platform and resources for younger, emerging and experimental artists to present, research, conceive and create work, and take risks

- Explore new and broader directions featuring performing arts as centerpiece and catalyst for important conversations (No Safety Net Festival (“NSN”), Arts & Ideas Festival, “New Creativity” Festival with College of Engineering arts and tech concept, regional dance festival, etc.)
- Center our work in Ann Arbor, but becoming more mobile; consider working more throughout the region and state, while continuing and integrated approach to programming and ECE; consider a mobile or pop-up venue
- Build more relationships and partnerships with regional education programs; leverage UMS artists to generate more impact for under-resourced schools/students
- Build a home, HQ, and new facility that supports and enhances all the above – and builds UMS’s brand

TIMELINE:

2018-19 Seasons

- Ongoing planning for No Safety Net, Michigan Opera Theatre collaborations in 2019-20 season.
- Forward planning and exploration for future NSNs, RENEGADE programming, Arts & Ideas Festival concept with U-M, Regional Dance Festival, Musical Theatre projects, etc.
- SWOT analysis and organizational interviews: Artistic and ECE
- Re-form an Artistic Advisory Council

2019-20 through 2020-21 Seasons

- Implement second NSN festival and MOT collaboration
- Advance and confirm major residencies for next three seasons
- Align artistic portfolio with other strategic pillars
- Implement a more transparent curation process for staff and stakeholders, especially around work which touches on current events and/or identity

2021-22 through 2022-23 Seasons

- Implementation and alignment with potential re-brand and UMS facility, etc.
- Have a fully aligned plan in collaboration with SMTD and other U-M campus units

Brand

GOAL:

Improve and elevate institutional brand position locally, regionally, nationally, and internationally; further enhance awareness and profile of activities on and beyond our stages; strategically enhance digital initiatives; methodically consider re-naming and re-branding the organization to reflect new, ambitious vision

PROCESS FOR RE-BRANDING / RE-NAMING UMS:

1. Peer Benchmarking & Researching Firms; Establish Timing for Project Rollout
2. Issue RFP; select firm
3. Interviews, Focus Groups & Surveys across broad constituency base
4. Concept / Initial Vetting
5. Focus Groups
6. Launch and Rollout (in conjunction with new season)

The entire process will take 12-18 months to complete.

DIGITAL INITIATIVES FOCUS AREAS:

- **Mobile Experience Optimization.** How can we maintain the most friction-free user experience possible, from discover to conversion?
- **Strengthen UMS's Brand Identity.** How can we make UMS more recognizable on campus, and better known as one of America's great arts presenters?
- **Storytelling / Sharing our Personality.** Many of the brightest minds in the performing arts world work here. How can we showcase them in the digital space?
- **UMS as Curator.** From playlist creation to podcasting, how can we become a "go-to" destination for quality entertainment, knowledge, and experiences beyond the stage?
- **Planning for the Future.** What is the balance between maintaining familiarity and introducing new features?

TIMELINE:

2018-19 through 2019-20 Seasons

- Create more opportunities for storytelling about process and product throughout the season; distribute across multiple channels on a regular timeline
- Develop clearer direction of how we describe UMS to those who don't know us or haven't experienced our work
- Utilize enhanced digital initiatives and broadcasting strategy to extend reach, specifically streaming, podcasting, live social media feeds, and radio broadcasting; evaluate impact of such initiatives
- Leverage national publicist to advance 1-3 major stories per season
- Standardize social media handles and activate across all platforms
- Explore resources, benchmarking and other means to help assess current brand and process by which brand might be further strengthened or reimaged

2019-20 through 2020-21 Seasons

- Explore branding of festivals, which accurately reflect the scale and scope of work that we do

- Research branding firms and develop RFP to explore renaming process that better reflect(s) UMS’s mission, vision and forward planning; align timing with other UMS initiatives
- Develop at least 5-8 moments in each season that have the potential for broader storytelling — mainstage performances, contextual programming, and other unique activities
- Partner with other organizations (Barbican, Edinburgh Festival/Fringe, Carnegie Hall, Philadelphia Orchestra) that have strong brand equity and credibility to enhance UMS (and/or a new) brand

2020-21 through 2022-23 Seasons

- Re-imagine, refresh and roll out the new UMS brand to reflect new ideas and strategy moving forward; align the re-brand with other strategic milestones
- Cultivate brand equity so that our organization is as highly regarded as peer institutions: BAM, Carnegie Hall, Barbican Centre

Geography, Impact & Access

GOAL:

Engage diverse communities at UMS and remove barriers to experiences for diverse communities; work toward deepening and broadening UMS's focus on community access and partnerships, geographical reach, and accessibility programs

Sub-Goal 1: Audiences of any socioeconomic status have more ability to purchase tickets and attend performances

Strategies:

1. Pursue a financial/fundraising model that allows UMS to maintain low ticket prices, especially for communities.
2. Launch a partnership and awareness campaign with organizations that serve low-income communities in order to connect communities with UMS experiences.
3. Set % attendance goal for each season. Track attendance and engagement through Tessitura.
4. Continue to provide the community with annual free or very low-cost events (i.e., secret concerts, free season opening events, etc.)
5. Continue to experiment with ticket pricing schemes (i.e., pay-what-you-can, fixed prices for all shows, general admission, etc.)

Sub-Goal 2: Increased presence in the city of Detroit paired with new philosophy for engaging this important market in the context of SE Michigan

Strategies:

1. Pursue a relationship-building “listening tour” in Detroit to better understand the Detroit landscape, Detroit’s pre-existing resources/assets/foundations, and define the unique contribution UMS adds to Detroit.
2. Use data gathered from listening tour and market research to develop a short document that defines UMS working philosophy in Detroit and clarifies UMS’s Detroit-focused goals
3. Focus on what UMS can uniquely do in Detroit. Prioritize projects that wouldn’t otherwise be possible without UMS’s participation.
4. Use the UMS brand and platform to elevate Southeast Michigan-based artists and artistic companies through the development and presentation of their work.

Sub-Goal 3: Audiences of all kinds make connections to UMS through streaming/digital/radio platforms

Strategies:

1. Produce an ongoing series of UMS radio broadcasts (“LIVE from Hill”) and livestreams (video and audio), and develop a longer term funding strategy to support the series.
2. Develop a set of metrics to understand the impact of radio broadcasts and livestreams, creating more follow through and ongoing communication
3. Use broadcasts and livestreams to build the UMS brand nationwide (internationally?) and reach audiences throughout Michigan and the USA.
4. Develop a UMS R&D team and budget to explore new tech-based strategies for UMS (online learning environments, VR, etc.)

Sub-Goal 4: Develop/reinvest in strategic Michigan-based (statewide) and National partnerships to multiply the opportunities for communities

Strategies:

1. Establish 3-4 geographic regions in Michigan (beyond Ann Arbor) where UMS will regularly be present with performances and education activities – Detroit, Dearborn, Flint, Midland? Grand Rapids? Western Michigan? – seeking alignment with U-M strategic imperatives and opportunities (Midland and Michigan Medicine, e.g.)
2. Develop a new artistic/engagement model around strategic communities identified in the ECE strategic workplan: the Arab and Arab-American community, Black/African-American community, e.g. Convene community-based advisory groups for building artistic programming and engagement activities. Leverage the fullness of UMS to collaborate with these communities.
3. Through marketing and engagement efforts, build better connections with and participation from Ann Arbor “satellite” communities (Ypsilanti, Saline, e.g.)

Sub-Goal 5: Ensure our physical and online spaces provide top-notch access for people of all abilities

Strategies:

1. Reactivate the UMS ADA Committee to provide an updated analysis of UMS facilities.
2. Ensure any new offices and facilities (UMS HQ) are forward looking and stretching for even greater accessibility than is legally required
3. Review and revise website accessibility annually to ensure up-to-date best practices and standards.

TIMELINE:

2018-19 Seasons

- Review ticket programs & opportunities to build awareness
- Append data from US Census and other sources to understand demographics of current audience
- Create a tool to measure the accessibility of venues & programs
- Cultivate members for a Detroit think tank to build a vision for UMS's evolving participation in region
- Document a working philosophy to guide UMS's principles & priorities for working in Detroit and statewide
- Develop ideas and concepts for more statewide engagement

2019-20 Season through Ongoing

- Identify & pursue high-impact, high-visibility projects in Detroit
- Explore potential programs to attract non-students under age 40
- Establish regular meeting schedule of Detroit think tank

Diversity, Equity & Inclusion

GOAL:

Ensure the future artistic and organizational health of both UMS and the larger performing arts presenters field, by committing in philosophy and through action to being a leader organization that nourishes inclusive and equitable environments utilizing the power of the performing arts

Previous Goal:

Recognize the unique power of the arts to convene and engage diverse constituencies; commit to being a local, regional, and national leader as one of the most inclusive and equitable environments within the performing arts

Sub-Goal 1: Through regular, focused, and intentional artistic and community programming initiatives, UMS strives to build up community and break down barriers created by racism, classism, ableism, ageism, sexism, homophobia, and transphobia.

Strategies:

- Support Programming and Geography, Impact & Access initiatives that seek to:
- Leverage resources to partner with smaller organizations and artists (see also Geography, Impact & Access Goal 2)
- Embrace technology based access efforts to reach audiences who cannot participate due to geographic distance (see also Geography, Impact & Access Goal 3)
- Raise awareness of current affordable ticket programs and explore the development and funding of new initiatives (see also Geography, Impact & Access Goal 1)
- Keep access for people of all abilities top of mind when making programming choices and technological efforts to reach audiences. (see also Geography, Impact & Access Goal 5)

Sub-Goal 2: Foster an organizational culture in which Staff are empowered to bring the fullness of their own identities, experiences, and points-of-view

Strategies:

- Identify and prioritize training that can nurture competency in engaging in conversations about issues of Diversity, Equity & Inclusion.
- Incorporate awareness building activities into staff annual goal setting. Participation in DE&I-focused UMS Education and Community Engagement efforts as well as other U-M related learning opportunities.
- Take the opportunities available when positions become vacant to review position descriptions with the purpose of identifying and removing position requirements that present unnecessary barriers to applicants with varied abilities and informal educational histories.
- Leverage U-M resources and arts management connections to increase the diversity of applicant pools and include experienced applicants who might not have 1:1 job histories in interview process.

Sub-Goal 3: UMS will have a Board, National Council, Sustaining Directors, Ambassador, and volunteer groups that are creative, innovative, and engaged because they embrace and embody the diverse experiences and values of our staff, community, and artists.

Strategies:

- Analyze the current demographics of the different groups to understand our reality and continue to analyze to measure success in creating diverse and successful groups.
- Prioritize demographics in recruitment for these groups.

- Identify opportunities to train board on diversity and implicit biases and build ongoing trainings and conversations into regular work of the groups.
- Create space on UMS Board and National Council for members from less financially privileged backgrounds whose contributions in experience, effort, and creativity will make them stronger and more effective.

Sub-Goal 4: Embrace the potential to impact diversity in the field of Performing Arts Presenters through the training, support, and mentoring of the next generation of arts managers.

Strategies:

- Work toward ensuring UMS is able to financially reimburse all student staff for their participation in the organization and eliminate obstacles lower income students face when student opportunities at arts organizations are volunteer internships.
- Enable UMS student hiring to be based on student interest, ability, and potential to positively impact the diversity of arts field instead of work-study award status.
- Create opportunities for student staff to engage with UMS staff across all departments looking for cross-departmental mentorship opportunities for all student staff interested in arts careers.
- Explore funding opportunities to develop a paid immersive arts leadership internship for students from underrepresented communities. Students would be provided hands-on experience across the organization as well as professional development opportunities related to the field (such as support to attend APAP or the annual Tessitura Community conference).
- Establish a list of U-M resources for UMS staff who manage student workers to access should they wish to be supportive of a student staff member who may appear to be struggling.
- Look for Diversity, Equity & Inclusion training opportunities at U-M for student staff to give them to tools to better represent UMS when they come into contact with diverse co-workers, audiences, and artists.

TIMELINE:

2018-19 Season

- Fall - Winter – begin facilitation and visioning; prepare an update for September full staff and board – outline goals, strategies and implementation plan
- Fall - Winter – Identify strategies that can immediately be incorporated into staff workflow and hiring efforts
- End of 2018-19 season – full report on DE&I process, plan, goals and implementation
- By Summer 2019 – Staff and Board training with ArtEquity; incorporate updated DE&I process, plan, goals and implementation into the U-M approved 2016 UMS DE&I plan.

- End of Summer 2019 – Create condensed version of the UMS DE&I plan to share on ums.org as part of the UMS strategic plan

Real Estate & Facilities

GOAL:

Develop and implement a new and aspirational vision for UMS staffing locations; create a new UMS HQ (or other name TBD) destination for evolving programming, education and community work

UMS HQ Vision Draft:

UMS HQ serves a vital niche and gap in Ann Arbor's, the University of Michigan's, and the region's cultural landscape. A modern destination for diverse artists, students, and communities, UMS HQ is conceived as a home to UMS and an arts accelerator – a dynamic and inclusive platform for provocative, daring, and experimental work. UMS HQ enables new experiences and explorations of traditional work, providing proximity to artistry and creative process.

Staff Priorities and Feedback:

- Should increase contact and interaction between staff and artists; be a place for all UMS constituents to engage with one another
- Welcoming, “cool place to hang out” – not just for performances; a place to learn, experience - where activation and multi-media engagement are key
- Parking, location, accessibility are paramount - location should be on or adjacent to U-M campus (student engagement, student workers, etc.). Only one box office?
- Remembering the balance between bringing audiences to the new space vs. going to them in their home environment
- Ultimately, HQ is a place and destination that embodies who we are and what we do – and signal that important and exciting work happens there

TIMELINE:

2017-18 Season

- Form Board ad-hoc real estate committee (DONE)
- Develop analysis and initial concept – build case for UMS and U-M (DONE)
- Site visits and exploratory discussions (DONE)
- Engage with theatre designer and/or space designer (DONE)

2018-19 Season

- Concept and building program development and scenarios – working with Charcoalblue

- Review with Ad-Hoc Committee, Board, key stakeholders in Fall/Winter
- Build consensus and energy for an appropriately scaled project
- Feasibility study on fundraising, capital structure, and staffing
- Board decision (go or no-go) about next steps by Summer 2019

2019-20 through 2022-23 Seasons

- Implementation of any plan and alignment with any potential re-brand

Financial & Fundraising

GOAL:

Create comprehensive and long-term financial model and fundraising plan(s) that further clarify and strengthen the organization’s fiscal health; prioritizing, coordinating, and aligning resources to fuel and advance UMS’s creative capital and reputation

Acknowledge current financial challenge(s), as well as future potential challenges resulting from further shifts in programming, new initiatives, a possible new home and HQ, as well as inherent longer-term and systemic issues for performing arts non-profits

FOCUS AREAS:

Finance

- Build long-term financial model (5+ years) to examine “baseline” revenue and cost trajectories and what must happen for UMS to remain vibrant and sustainable (draft financial model will be reviewed Feb 2019)
- Endeavor to fully understand long-term capital and endowment needs, as well as determine how to reduce dependence on board-designated funding over time
- Engage financial consultant to build cost models around HQ project, different scenarios, cost and staffing implications (IN PROCESS)
- Examine new structures and cost models for NSN-related programs and engage in discussions about how to better anticipate and fund this stream of programming, which requires greater contributed support
- Explore opportunities for cost reduction and efficiency measures as possible, including institutional partnerships for cost-sharing opportunities

Fundraising

- Identify, appoint and install new leadership for Development (DONE)
- Activate, build and engage UMS affinity groups - National Council, Sustaining Directors, and Ambassadors
- Reimagine Development team and clarify roles
- Sustain loyal donors while increasing support and donor pipeline
- Deliver excellent customer service and demonstrate donor impact

TIMELINE

2018-19 Season

- Activate and better utilize Board Development Committee and leadership
- Reimagine Development team and clarify roles
- Explore opportunities to grow both annual and major giving donor pool, focusing on gap to goal of new money while maintain historical donors
- Recommit to fully utilizing data resources available at U-M's Office of University Development
- Establish multi-year funding opportunities for donors that align with UMS strategic priorities
- Explore opportunities for cost reduction and institutional partnerships for cost-sharing opportunities

2019-20 through 2021-22 Seasons

- Develop detailed metrics-driven strategies for donors, defined in three categories:
 - Past: Stewardship and continued engagement of our historic donors, sponsors, foundations, and planned gifts
 - Present:
 - Focus on the major giving prospects for lead campaign gifts; gifts of \$100K and above; and presenting corporate sponsors
 - Continue to grow and engage National Council (and possibly "Presidents Council/Next Generation" audience) with fundraising goals for each group
 - Explore opportunities to grow permanent endowment
 - Future:
 - Commit staff resources to discovery work, and mid-level and major gift donor management, focused on Michigan and Chicago areas
 - Identify and solicit 10 new foundation relationships (\$100k level).
 - Engage next generation professionals
 - Identify and document [Qty to be defined] amount of documented bequests
 - Increase multi-year commitments by [Qty to be defined]
 - Increased engagement and giving by Sustaining Directors, Board, and Ambassadors

2022-23 through 2023-24 Seasons

- Development discovery seeds are planted, and messaging and marketing plan completed
- All affiliate groups running smoothly, with clear governance, goals, and annual plans (including 100% giving by all participants)
- U-M Campaign kick-off, with campaign priorities identified

Appendix 1

Excerpt from UMS Strategic Plan 2016-2019 – Goals and Objectives

Goal 1: Connecting Artists & Audiences through Performances and Learning Experiences

- 1.1 Continue innovative programming and risk-taking
- 1.2 Develop a shared vision for Education and Community Engagement

Goal 2: UMS Identity & Communication

- 2.1 Leverage the UMS brand locally, regionally, and nationally

Goal 3: U-M/UMS Institutional Relationship

- 3.1 Engage U-M in early discussions around venue renovations

Goal 4: Organizational Excellence

- 4.1 Design and execute a thoughtful succession plan
- 4.2 Develop means for intermediate staff co-location
- 4.3 Increase diversity across the UMS enterprise

Goal 5: Financial Strength & Stability

- 5.1 Successfully complete the endowment and operating campaigns
- 5.2 Articulate the desired outcomes for the National Council

Appendix 2

Excerpt from UMS Education and Community Engagement Department Work Plan 2017-2020 – Goals and Objectives

Community Engagement

Goal 1: Reinvigorate UMS as a hub for dialogue and action around issues of diversity, equity, and inclusion by deliberately placing ourselves at the center of conversations about the most pressing social issues of our time

Goal 2: Refocus the deployment of adult learning programs to create true “front door” experiences that intentionally broaden access to people who are not currently UMS ticket buyers

Goal 3: Use venues in innovative and surprising ways to deepen the performance experience for people who are UMS ticket buyers

K-12 Program

Goal 4: Become a regional leader in infusing more arts and arts-integrated resources directly into K-12 classrooms

Goal 5: Shift the K-12 engagement focus, so, that by 2020, 65% of participants in UMS K-12 school programs will qualify as underserved

Goal 6: Amplify our role in offering sophisticated live arts experiences for young audiences, in complement with the traditional School Day Performance format

Goal 7: Formalize, enhance, and expand arts integrative experiences across campus

Internal Capacity

Goal 8: Develop ECE departmental capacity

Goal 9: Increase financial resources dedicated to Education & Community Engagement