



# **Strategic Plan**

## **2017 – 2022**

**Adopted: June 6, 2017**



## **Youth Orchestra of Bucks County**

### **Board of Directors 2016 – 2017**

Paul Clough, President  
Joseph Hochreiter, Vice President, Development  
Dawn Karlyn, Treasurer  
Stephanie Schwartzberg, Secretary  
Alex Godun  
Jean Holmes  
Jacqui King  
Elliot Kolodny  
Steve Kyle  
Joyce Lin  
Robert Loughran, Music Director  
David Osenberg  
Steve Sweetsir, Assistant Music Director  
Charlie Walker

### **Strategic Planning Committee**

Paul Clough, Chair  
Joseph Hochreiter  
Steve Kyle  
Robert Loughran  
Colleen Sweetsir  
Charlie Walker

### **Staff 2016-17**

#### **Executive Staff**

Colleen Sweetsir, Executive Director  
Robert Loughran, Music Director  
Steven Sweetsir, Assistant Music Director

#### **Administrative Staff**

Diana Nolan, Office Manager  
Erica Cherry, Operations Manager  
Susan Busch, Volunteer Coordinator  
June Bilcik, Executive Assistant  
Dalyle Magida, Social Media Coordinator

#### **Conductors**

Karl Krelove  
Thomas Cunningham  
Colin Oettle  
Erin Sweetsir  
Sebastian Grand  
Bill Trigg  
Margaret Claudin  
David Osenberg  
Kathleen Mitchell



### **YOBC Values:**

- **Artistic Excellence** as achievable for each ensemble
- **Teamwork** among staff, participants and volunteers
- Providing a **Nurturing, Respectful and Enjoyable** environment that supports all participants
- **Challenging** all participants to strive to maximize their musical development and personal growth
- The promotion of **Service** to others through individual and collective efforts

### **YOBC Mission**

YOBC creates opportunities for young musicians to achieve artistic excellence through enriching classical music experiences.



## Key Areas of Organizational Focus

1. **Core YOBC Ensembles** – Provide a musical experience at the highest level possible to challenge participants from their entry into YOBC through high school.
2. **Special Music Programs for Core Ensembles** – Provide additional opportunities, such as master classes, guest artists, concerts and workshops, each year to enrich and broaden participants' educational experience.
3. **Students-in-Concert** – Partner with schools to provide access to enhanced instrumental music education programs for students who live in communities where schools have reduced or eliminated such programs.
4. **Personnel** – Secure and support high quality artistic and administrative personnel required to support YOBC's mission and continued artistic growth.
5. **Facilities and Infrastructure** – Proactively identify and secure administrative and artistic/educational facilities required to support YOBC's mission and continued artistic growth.
6. **Financial Stability & Management** – Ensure the continued financial health of YOBC through effective financial planning, development and stewardship of financial resources, as well as the continued review and enhancement of financial processes and controls.
7. **Marketing & Awareness of YOBC** – Build awareness of YOBC, its mission and programs with the families of potential participants and the music and education communities as well as potential individual and corporate donors.



## Strategic Goals

Core YOBC Ensembles		
Goals/Tasks	Timeline	Responsibility
<p><b>1. Affirm YOBC's commitment to school music programs and strengthen relationships with local music teachers and schools:</b></p> <ul style="list-style-type: none"> <li>○ Advertise YOBC in selected school music program concert programs</li> <li>○ Develop program for YOBC personnel to attend school music programs (in an official capacity)</li> <li>○ Gather feedback/input from school music teachers regarding challenges and priorities of school music programs and how YOBC can best work with them.</li> </ul>	<p>September 2017</p> <p>FY 2019</p> <p>FY 2019</p>	<p>Executive Director (delegate to Development Asst.)</p> <p>Executive Director</p> <p>Executive Director with Board involvement</p>
<p><b>2. Develop feeder systems for YOBC Core Ensembles</b></p> <ul style="list-style-type: none"> <li>○ Establish summer music camp</li> <li>○ Pre-K music education program</li> </ul>	<p>Test Summer 2017 Evaluate &amp; adjust 2018</p> <p>Evaluate Feasibility by 6/2020</p>	<p>Executive Director</p> <p>Executive Director</p>
<p><b>3. Evaluate and potentially develop an enhanced chamber music program</b></p> <ul style="list-style-type: none"> <li>○ Separate and enhanced from large ensembles</li> <li>○ Tuition supported</li> <li>○ Potential for either Saturday or weeknight rehearsal times</li> </ul>	<p>Evaluation By 6/2018; If feasible implement, 9/18</p>	<p>Music Director / Executive Director</p>
<p><b>4. Strengthen relationships with area college/universities</b></p> <ul style="list-style-type: none"> <li>○ Encourage participation in YOBC by local college students (members, mentors &amp; interns)</li> <li>○ Access to additional facilities</li> <li>○ Reciprocal access to educational programs</li> </ul>	<p>FY 2018 and then On-going</p>	<p>Executive Director</p>

<b>Goals/Tasks</b>	<b>Timeline</b>	<b>Responsibility</b>
5. Develop plan for adequate rehearsal space for all ensembles <ul style="list-style-type: none"> <li>○ Evaluate a second rehearsal location that can accommodate 75-80 performers</li> <li>○ Evaluate longer rehearsal time allotted to each ensemble</li> <li>○ Evaluate the possibility of shifting rehearsal times for junior and intermediate divisions to Saturday in order to liberate space at BCCC</li> </ul>	Evaluate spring 2018 and annually thereafter	Music Director / Executive Director
6. Evaluate the effectiveness of the artistic program annually at year end, specifically including, but not limited to, the season concert schedule, core ensemble program, enrichment programs, guest artists, auditions/placement, and tour	FY2018 June Board Meeting and annually thereafter	Music Director

<b>Special Music Programs for Core YOBC Ensembles</b>		
<b>Goals/Tasks</b>	<b>Timeline</b>	<b>Responsibility</b>
1. Continue to develop and improve key aspects of existing YOBC programs, including: <ul style="list-style-type: none"> <li>○ Master classes</li> <li>○ Artists in residence from Philadelphia Orchestra or other major orchestras</li> <li>○ Biennial international tour</li> <li>○ Collaborations with guest musicians</li> <li>○ Periodic music commissions</li> <li>○ Crossing Classical Boundaries series</li> </ul>	FY 2017 and on-going	Music Director / Executive Director
2. Implement the 4-Year Artistic Plan (see Appendix 1)	FY2016-17 through FY2019-20	Music Director / Executive Director

Goals/Tasks	Timeline	Responsibility
3. Present a European style concert at a Bucks County outdoor venue with full ensembles	FY 2019	Music Director / Executive Director

Students-In-Concert														
Goals/Tasks	Timeline	Responsibility												
1. Expand the three existing programs rather than launch a fourth program. Build on their unique needs to expand the programs. Target growth: <table style="margin-left: 40px; border: none;"> <thead> <tr> <th></th> <th style="text-align: center;"><u>2016-17</u></th> <th style="text-align: center;"><u>2021-22</u></th> </tr> </thead> <tbody> <tr> <td>Bristol Township</td> <td style="text-align: center;">45</td> <td style="text-align: center;">60</td> </tr> <tr> <td>Morrisville string</td> <td style="text-align: center;">17</td> <td style="text-align: center;">25-30</td> </tr> <tr> <td>Bristol Borough</td> <td style="text-align: center;">35</td> <td style="text-align: center;">50</td> </tr> </tbody> </table>		<u>2016-17</u>	<u>2021-22</u>	Bristol Township	45	60	Morrisville string	17	25-30	Bristol Borough	35	50	In Goal Statement	SIC Program Coordinator
	<u>2016-17</u>	<u>2021-22</u>												
Bristol Township	45	60												
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2. Evaluate the effectiveness of the SIC annually at the end of each fiscal year <ul style="list-style-type: none"> <li>○ Attendance</li> <li>○ Reenrollment</li> <li>○ Overall Enrollment</li> <li>○ Other educational metrics (21<sup>st</sup> Century)</li> </ul>	June Board Meeting FY18, and annually thereafter	SIC Program Coordinator												
3. In Morrisville, <ul style="list-style-type: none"> <li>○ Grow the program to be a Chamber Orchestra</li> <li>○ Get a MSD employee assigned to be the primary liaison</li> </ul>	September 2018 September 2017	SIC Program Coordinator												

<b>Goals/Tasks</b>	<b>Timeline</b>	<b>Responsibility</b>
4. Formalize the operational aspects of SIC including but not limited to: <ul style="list-style-type: none"> <li>○ Critical and recommended program elements – Program plan</li> <li>○ Program calendar including required program aspects (e.g., parents meeting)</li> <li>○ Create written agreement w/school districts (including expectations)</li> </ul>	August 2018	SIC Program Coordinator  SIC Program Coordinator SIC Program Coordinator / SIC Committee
5. Obtain instruments to support a string orchestra	September 2018	SIC Program Coordinator / SIC Committee
6. Seek opportunities for inter-community coordination of SIC program elements where beneficial	FY2018 and thereafter	SIC Program Coordinator / SIC Committee
7. Evaluate developing SIC programming in the Summer	Summer 2018	SIC Committee
8. Develop a relationship with the Philadelphia Pops to support SIC	FY 2018	SIC Program Coordinator / SIC Committee
9. Develop a strategy to ensure that SIC does not become a substitute for a district paid school music program	FY 2018	SIC Program Coordinator / SIC Committee

<b>Personnel</b>		
<b>Goals/Tasks</b>	<b>Timeline</b>	<b>Responsibility</b>
1. Create position description for and hire a part time Development resource	Summer 2017	Executive Director / Development Committee
2. Develop a succession plan for key staff, including but not limited to Executive Director, Music Director, Assistant Music Director	Submit to Board for approval at June 2018 meeting	Executive Director and President in consultation with Executive Committee





<b>Goals/Tasks</b>	<b>Timeline</b>	<b>Responsibility</b>
3. Develop process for recruiting and utilizing college students as interns both for administrative work and musicians, including the creation of job descriptions and a recruiting process	June 2018	Administrative – Executive Director Musicians – Music Director
4. Create position for and hire a full-time music director	For FY 2020-21	Executive Director / Executive Committee

<b>Facilities, Locations and Infrastructure</b>		
<b>Goals/Tasks</b>	<b>Timeline</b>	<b>Responsibility</b>
1. Develop a solution for administrative and storage space, that includes space for the YOBC music library	August 2018	Facilities Committee
2. Develop and maintain an inventory of all YOBC assets	June 2018	Treasurer and staff as delegated by Executive Director

<b>Financial</b>		
<b>Goals/Tasks</b>	<b>Timeline</b>	<b>Responsibility</b>
1. Evaluate Development programs and present recommendations for subsequent fiscal year to Board at June Meeting.	Annually beginning with FY2017-2018	Development Committee
2. Develop set of financial policies and procedures that support the needs of YOBC.	December 2017	Finance Committee
3. Evaluate YOBC tuition in comparison with other Youth Orchestras	March 2019 and every 2 years thereafter	Executive Director / Treasurer

<b>Goals/Tasks</b>	<b>Timeline</b>	<b>Responsibility</b>
4. Evaluate the YOBC tuition structure including: <ul style="list-style-type: none"> <li>○ Should we charge different amounts for different ensembles?</li> <li>○ Should there be a cost to participate in Chamber ensembles?</li> </ul>	December 2018 to set tuition for FY 2018-19	Executive Director / Treasurer
5. Investigate ‘best practices’ of Youth Orchestras with regard to percentage of costs covered by tuition/development and determine a time frame to move towards that goal.	Initial evaluation – June 2018	Development Committee with support of Executive Director
6. Raise additional funds to support a European tour that can enable more participants to go regardless of financial need, increasing aid from \$13,000 for the 2016 tour	Target for 2020: \$18,000 Target for 2022: \$23,000	Development Committee
7. Enhance YOBC’s database and reporting capability to more effectively support alumni engagement and fundraising	Make incremental improvements annually	Executive Director with input from Board / Development Committee

<b>Marketing &amp; Awareness of YOBC in the Community</b>		
<b>Goals/Tasks</b>	<b>Timeline</b>	<b>Responsibility</b>
1. Develop, implement and evaluate marketing programs to build awareness of YOBC in the community with a focus on parents of families with young children. Present findings to Board at June meeting.	Annually beginning with FY2017-2018	Marketing Committee in conjunction with Executive Director



<b>Board</b>		
<b>Goals/Tasks</b>	<b>Timeline</b>	<b>Responsibility</b>
1. Endeavor to increase Board diversity and maintain that diversity (e.g., SIC representation, age, gender, cultural / ethnic background) to be reflective of YOBC program participants.	On-going	Leadership & Governance Committee
2. Develop and strengthen the committee structure	On-going	President

## **YOBC Four Year Artistic Plan** **2016-2020**

### **Four-Year Artistic Plan**

Include the following artistic/educational enrichment elements each season to enhance YOBC's ensemble program. All guest artists and clinicians will be chosen based on the musical needs of YOBC's educational program as determined by YOBC conductors and the Music Director. Guest soloists must also be further vetted using YOBC's *Guest Artist Selection Guidelines*.

- Musical Enrichment Offering – Guest lecturer to speak on topics related to music performance. One session each season to be open to both YOBC students and music students from the community. Sample topics: *Effective Practice Techniques, Coping with Performance Pressure, How to Prepare for Auditions*.
- Artist-in-Residence  
Strengthen YOBC's association with Philadelphia Orchestra by identifying a Philadelphia Orchestra musician to serve as an Artist-in-Residence each season. 90 minute master class and possible guest solo performance with YOBC.
- Philadelphia Orchestra Master Class Series  
Strengthen YOBC's association with Philadelphia Orchestra by identifying 3 additional master class presenters from the Philadelphia Orchestra to present 90 minute master classes throughout the year.
- Wind/Percussion Clinician Workshop  
The Assistant Music Director will identify an annual guest clinician to present a workshop for all YOBC large wind ensembles. (Fanfare Winds, Wind Ensemble, Wind Symphony)
- Guest Soloist with Advanced Division Ensemble  
The Music Director will identify an annual guest soloist to perform with YOBC Symphony Orchestra and/or Fanfare Winds.
- Periodic Philadelphia Orchestra Concert Field Trips for Advanced Division and Jr/Inter Division Students and SIC students as determined by YOBC/SIC scheduling and programming offered by PSO