

Kitchener Waterloo Community *Orchestra*

Three Year Plan: 2018 - 2021

Music Director's Message

I am quite encouraged by the direction of the KWCO in general. I feel that our presence in the community and our contribution to the community is being enhanced by the concerts we perform and our involvement in fundraising and media events of various charities in the region. I feel there is room for growth and development within our organization in terms of recruitment, audience building, and participation of our membership in assisting in the operations of the group. The KWCO will continue to provide an outlet for amateur musicians of all ages in our region to perform wonderful music in a relaxed, enjoyable atmosphere, while giving back something to the community in which we live.)

President's Message

Members of the KWCO are enriched by belonging to a group of diversified people who share common themes - music, the arts and the encouragement of self-expression. The KWCO fosters acceptance and inclusion of players at all levels and adopts a mentor role in the world of music in the KW area.

As we move into the future, arts organizations will continue to face budget cuts, competition for affordable and appropriate venues, ongoing fundraising challenges and the task of maintaining membership and audiences. To address some of these areas, we need to continue to raise the profile of the orchestra in the community by doing active outreach to the community to ensure player membership, audience attendance, community awareness and corporate interest.

This three year plan will serve to provide guidance to recent and future members of the KWCO Board of Directors, helping to establish goals and deadlines for achieving where we want to be in three years time and how we might get there.

History

The Kitchener-Waterloo Community Orchestra was inaugurated in 1979 as a summer repertory orchestra conducted by Erna Van Daele. The purpose of the orchestra was to provide an opportunity for amateur players in the community to sight read a variety of orchestra music. An exciting summer of music led to high interest in continuing the orchestra on a permanent basis. By 1980 the KWCO was launched, a constitution was written and a formal Board of Directors Elected.

In 1985, our founding conductor Erna Van Dale resigned and Edit Haboczki, a graduate of the Franz Liszt Academy of Music in Budapest, Hungary, became our conductor for eight seasons. Ms. Van Dale returned for two years, and in January 1995 Fabio Mastrangelo from Bari, Italy led the orchestra until June 1998. In September of 1998, Daniel Warren became our conductor and Music Director, and has grown the orchestra in number, performance standard, and friendship for the past 20 years.

Mission Statement

The Kitchener Waterloo Community Orchestra is dedicated to providing an environment for amateur musicians to practice and perform orchestral music for the community. The KWCO provides a welcoming, enriching musical experience by creating a place to play music and improve musicianship for all levels of musician. We are of service to the community by providing an accessible source of live orchestral music performance.

Values

The KWCO is an incorporated, non-profit, registered charitable organization catering to amateur musicians. We are committed to providing access to music for musicians of moderate to advanced levels through weekly group instruction and performance opportunities.

We plan to do this in a way that promotes the following core values:

- **Education:** Musicians of all levels need the opportunity to grow and practice their craft in a non-intimidating atmosphere where they are encouraged to accomplish their individual goals.
- **Accessible:** Music should be accessible to everyone who wants to play or listen. We do not hold auditions, our ticket fees are low (free for youth) and we hold our rehearsals and concerts in accessible facilities .

- **Excellence:** to provide varied musical programming at a high level of performance that will enhance the lives and well-being of our members and our community.
- **Diversity:** The KWCO is committed to inclusion, diversity, equity, and accessibility. Because we care about the vitality of our art form, we seek to better understand, reflect, engage, and celebrate our diverse heritage and community.
- **Collaboration:** To form community partnerships with like-minded organizations in the region in a spirit of respect and cooperation for the promotion of the arts.

Vision and Goals

In order to best achieve our Mission Statement, KWCO will implement the following goals over the next Three Years:

Improve our services to our membership:

KWCO was developed as a place for amateur musicians to gather and play orchestral music. Our members currently pay dues on an annual basis, which is our largest source of income. It is important that we strive to provide our members with the most value and personal enhancement for their investment of finances and talent.

Improve our services to our community:

KWCO believes that the enjoyment of music should be barrier free, and that attending live orchestral music is an important personal investment. We want to be able to produce the best music and provide the best performance experience for our patrons for the least amount of financial expense. We value our audience support, and wish to be able to continue to provide cultural enrichment for their investment.

Improve our brand recognition:

In order to achieve our Mission Statement, KWCO recognizes the importance of increasing audience size and community awareness of KWCO. During this Three Year Plan, the Board will focus on promoting the orchestra and concerts online, and through building community partnerships.

Improve performance standard of the string section through increased rehearsal time with professional section leaders:

KWCO has enjoyed great success with our Viola Section Leader, and wishes to further increase the performance level of our string players by hiring professional section leaders for the Second Violins and Cellos. To accomplish this, the revenue of the orchestra must be significantly increased over the next three years to consider this as a financially viable option.

Objectives and Tasks

Strategy: Improve our services to our membership

1. Musical Development:

- a. utilize benchmark of 10 rehearsals per concert, including a sectional with professional coaches for thorough learning opportunity of the material
 - b. prepare 3 or 4 concerts per year of symphonic classical music
 - c. gauge interest through the use of an online survey each season in an all-day workshop using professional coaches, and implement when desired by membership
 - d. incidental instructional sessions such as string sectionals, and music technique workshops (such as the bow workshop hosted by KWCO Viola Section Leader/ past professional violist with KWS Margaret Metcalfe)
 - e. increase opportunity for weekly learning at rehearsals by hiring professional sectional leaders for second violins and cellos
 - f. a rehearsal evening spent playing through music by sight is held occasionally. This music is not the material planned for upcoming concerts but provides the opportunity for exposure to more difficult pieces or seasonal selections not usually programmed.
2. No Dues Increase:
 - a. maintain membership fees at \$190 per season
 - b. The board of directors has on occasion exempted in part or in full payment of fees for members who have demonstrated financial hardship.
 3. Communication: ensure open lines of two way communication between the Board and the membership to foster a feeling of transparency, inclusion, ownership and community, as monitored by the Director of Communications
 - a. weekly rehearsal notes from the Personnel Manager to the membership regarding rehearsal order and reminders
 - b. surveys via email to the membership from the Director of Communications focused on upcoming concerts, rehearsal schedules and members preferences, suggestions and comments
 - c. ConGusto newsletter to the membership (and community via website) highlighting KWCO achievements, highlighting members and relevant news, listing upcoming performances, messages from the board and the membership at large
 4. Special Events: ensure a Board position (Director of Special Events) is responsible for coordinating special events optional and available to the membership such as
 - a. organized outings, such as to “Live at the Met”
 - b. social opportunities at Christmas and end of season
 - c. Celebration of our 40th Anniversary of KWCO 2019/2020 season: committee to be struck to coordinate special programming of celebration
 - d. Social time and snacks during the first rehearsal of each concert and dress rehearsals
 5. Travel: Provide members with opportunity for international travel. Concerts and tour to Northern Italy be planned for summer 2020, as planned by the trip committee made up of orchestra and board members
 6. Policy: The Board is to draft and implement
 - a. a responsible proactive policy to ensure the privacy and protection of members’ information (data) and
 - b. to develop and implement a harassment free policy to ensure all interactions are appropriate and provide an avenue for recourse should they not be.

7. Lifetime Membership: Encourage long-term membership and involvement, providing a lifelong “musical home” for amateur musicians. Our “Lifetime Member” program recognizes individuals who have made a significant contribution to the orchestra through the length of time they played or other involvement. Benefits include a standing invitation to participate in all orchestra social events and free tickets to all regular concerts. This provides a lifelong “musical home” and community for our amateur musicians.

Strengths: The KWCO excels at attracting and keeping longtime members who greatly enjoy their experience of playing in the orchestra. The atmosphere is friendly and non-threatening.

Challenges: The KWCO, as a community organization, has members ranging from beginners to near professional quality. Concert programs must be planned to offer challenges and successes to each level of player.

Key Performance Indicators:

- full musical sections of the orchestra is the main indicator of success, as monitored by the Personnel Manager
- continue to utilize online surveys to poll members on their level of satisfaction, as monitored by the Director of Communications
- have a fully staffed Board of Directors, and fully staffed committees

Action: Increase revenue to afford hiring full time section leaders for cello and second violin, thus improving the instructional opportunity for our members, increasing our performance ability, and generating increased audience attendance.

Strategy: Improve our services to our community

1. Youth Demographic: commitment to encouraging youth to become involved with seeing and participating in live orchestral music. KWCO recognizes that a commitment to youth provides for our future audience and future orchestra members.
 - a. continued partnership with KW Kiwanis Festival yearly to host the winners of their Concerto Competition
 - b. free entrance to our concerts for ages under 18
 - c. volunteer opportunities for high school students
 - d. targeted marketing and member volunteer hours for outreach - to high schools and music schools
2. Senior Demographic: KWCO recognizes that attending live music is essential for a person’s well-being and sense of connectedness. We are committed to putting our resources toward making an outreach to our “more experienced” audience.
 - a. targeted marketing and member volunteer hours for outreach - delivering posters and invitations to local retirement homes and senior communities
 - b. introduction of group rates, to make attendance more affordable for planned outings on activity calendars
 - c. caregivers or staff admitted without cost
 - d. ensure performance venues are accessible
3. Improve concert experience for our patrons
 - a. continue our partnership with Knox Presbyterian Church in Uptown Waterloo as a concert venue

- b. change of venue for Fundraiser dinner concerts (Opernball/Viennafest) and Silent Auction to facilitate larger audience and more professional atmosphere: 2018 held at St. George Hall which is fully accessible
 - c. maintain and grow front of house presentation, utilize simple and consistent decor to present professional and comfortable audience experience
 - d. utilize Powerpoint program notes projected during concerts
 - e. investigate providing refreshments during intermission
 - f. keep in mind values of environmental responsibility
 - g. keep in mind cost both monetarily and of volunteer time needed
 - h. look at opportunities to create community partnership by allowing small businesses to cater (and assume profit)
 - i. remove barriers for ticket purchasing - make available debit/credit options, advanced sales
 - i. currently can pre-order through visa and email
 - ii. currently have the capability to utilize "Square"
 - iii. investigate and invest in online sales capability
4. Policy: develop and implement data protection policy as online financial activity increases for our patrons

Strengths: Entering our 40th season during this three Year Plan, KWCO is well established in the community. It has enjoyed a full complement membership for many years, with a waiting list for some positions.

Challenges: Changing performance times to matinee concerts is preferable for the senior demographic, but difficult to balance with availability of concert venue and coordinating a full same day dress rehearsal

Key Performance Indicators: Track purchase of group sales and youth attendance at concerts, audience survey to determine satisfaction with change of venue for dinner concert and silent auction

Action: Complete tasks as indicated in Strategy outline, and report to the Board

Strategy: Maintain and improve brand recognition

1. Consistency: build on new logo and continuity of posters/brochures/programs formatting
2. Website: maintain and improve functionality and presentation of website, online donations and ticket sales
3. Social Media: maintain and increase social media presence on Facebook, Instagram and Twitter, as outlined further in Marketing. Ensure logos of all applicable social media are promoted on posters and brochures.
4. Posters: review and both streamline and expand poster placement for maximum exposure
5. Coordination with other Orchestras:
 - a. when planning season, avoid concert overlap with other musical community and professional organizations
 - b. maintain a cooperative relationship with other community orchestras: promote their concerts on social media, cross promote with flyers at our concerts and their concerts, promote concerts on social media and in weekly rehearsal reminders to members

- c. give members further opportunity to play and improve their craft if they sit in with other orchestras
 - d. whereas it can be seen that having more orchestras dilute the market, research shows that “people who go out, are people who go out”.
 - e. the orchestra welcomes opportunities to perform with other groups. Other groups may include choirs, orchestras or dance groups.
6. Build community partnership with like minded organizations
- a. continue partnership with KW Kiwanis Festival yearly to feature winners from the Concerto Competition
 - b. partner with music schools to encourage students’ attendance to concerts
 - c. feature local business opportunity to provide refreshments at concerts
 - d. investigate further partnerships with local restaurants for dine and concert packages
 - e. partner with local radio CKWR to spotlight concert
 - f. utilize local media such as CKCO TV “Community Minute”, CBC KW “5 things to do this weekend”, and KW Record Calendar etc.
 - g. attend Chamber of Commerce non-profit and business networking opportunities
7. Rehearsal Space
1. Partner with City of Waterloo to help create adequate rehearsal and storage space in the **Waterloo Memorial Recreation Complex** expansion, set to open the summer of 2021
 2. The Board must be prepared with contingency plans to deal with financial ramifications of a significant change in rental costs

Strengths: Previous board visions and actions developed a sleek, professional consistent logo and brochure/poster/program format: a level of branding that captures the level of professionalism the orchestra has reached.

Challenges: The implementation of these activities is reliant upon volunteers. The timeline for marketing activities is tight and information gathering is sometimes difficult for volunteers to present a complete package in the branded format in a timely manner. . It is important to try to engage all membership in some tasks suited to them, and ensure volunteers are recognized and consulted often , to avoid burn out of key players.

Key Performance Indicators: The success of this goal will be monitored through Google Analytics for Website traffic, Social Media followers and activity, as well as through attendance at concerts and quantity of community partners

Action: Complete tasks as outlined in Strategy, and report to the Board

Strategy: Increase revenue by \$7000 per year to hire section leaders for second violins and cellos

- also: increase concertmaster honorarium to be on par with section leaders
- also: provide soloists with competitive compensation
- note: hiring section leaders should not inhibit the financial stability of the orchestra or impact the number of times the orchestra can perform

1. Marketing:

- a. “Google Grants” - advertising for nonprofits to increase brand awareness as well as increase audience size at concerts: to be done by Long Term Strategy committee
 - b. Social Media: maintain and increase presence on social media platforms:
 - i. Facebook - continual main page posts as well as special event listing for concerts
 - ii. Instagram (increase followers to 500)
 - iii. Twitter (second attempt at account to be launched): to be completed by the Social Media Committee
 - iv. utilize a small marketing budget to optimize searches and promote events on Facebook and Instagram
 - v. ensure logos of applicable social media are advertised on website, posters, programs, brochures
 - c. Senior Demographic: complete targeted mail out of brochures this summer to retirement residences and senior communities
 - d. Targeted Marketing: utilize Environics Analysis of Waterloo Region musical patrons for one targeting marketing campaign per year
 - e. Community Media: utilize community promotional opportunities like “Community Minutes” on CKCO TV, events calendar in KW Record, CBC KW “Kate’s 5 fun things to do this weekend”
 - f. Print Advertising: review poster distribution, streamline then expand current practice
 - g. Email List:
 - i. continue to grow the audience mailing list with opportunities to sign up on the website and at concerts
 - ii. Posting List - continue to update emails and add advertising locations to this list keeping in mind the CASL and Privacy legislation in mind.
2. **Ticket sales:**
- a. Promotional Tickets: utilize up to 60 tickets for promotion (18 and under free, caregivers/staff for seniors) to try to sell the remaining 300
 - b. Motivate ticket sales among members
 - c. Dedicate Long Term Strategy Committee to marketing as one of their projects
 - d. Increase regular ticket prices from \$18 to \$20 this still keeps prices at a level lower than those of local professional groups in order to capture the audience for our concerts that cannot afford to attend high priced symphony concerts
3. **Fundraising and Donations:**
- a. Continue with current fundraising endeavours:
 - i. reiterate to membership the importance of fundraising. Engage social and competitive enjoyment through competition between sections
 - ii. fundscrip
 - iii. Vincenzo's gift cards
 - iv. 50/50 draws monthly at rehearsal and at concerts
 - v. hold two “fundraising” dinner concerts and silent auctions (November 2018 Opernball, 2020/ 2021 Season Viennafest) - planning to be completed by Special Events and Concert Organization Committee
 - b. Membership fees: maintain membership fees at current level (\$190)
 - c. Online:

- i. maintain online donation capability on website: currently Canada Helps, Giving Tuesday and Junes Let's get that \$10000!
 - ii. post registered charity status on website and number (to ensure compliance with Google Grants requirements)
 - d. Corporate Donations/ Sponsorships
 - i. utilize sponsorship program developed by LTS Committee to increase corporate sponsorship
 - ii. Donors take time to develop. In developing the strategic plan, it's the Board's goal to attract more donors to the organization through the clear articulation of our value proposition to the community.
 - e. Donation Box
 - i. have a donation box and tax receipt envelopes available at all concerts
- 4. **Grants:**
 - a. currently receive grants from the City of Kitchener and the City of Waterloo
 - b. The board of directors is well aware that there is no guarantee these grants will be available in the future
 - c. be mindful that in the current political climate funding for the arts is not a secure source of income, and the orchestra should be prepared to replace the income from these grants through other means
 - d. work with Orchestras Canada to advocate for arts funding from local MP/ MPP
 - e. utilize LTS Committee to search an appropriate Grant and Grant project for application
 - f. further investigate partnering with "Grant Advance": small financial investment to decrease large volunteer time investment to source out appropriate grants/ donors
- 5. **Fiscal Responsibility:**
 - a. The KWCO needs to maintain a positive cash flow that is strong enough to support our current and future operations and to manage unexpected financial crises
 - b. The KWCO expenditures are to be prepared by the treasurer and presented to the Board monthly, the members annually or upon request.
 - c. Books to be reviewed in accordance with by-laws every two years

Strengths: The Board of Directors, past and present, has moved forward with digital marketing: developing and upgrading a website, started a social media presence on Facebook. The Board continues to adopt technological advances by pursuing e-payment options and further social media marketing. Also, the KWCO Treasurer is diligent at examining financial projections and current expenditures.

Challenges: There is sometimes resistance toward marketing and ticket sales initiatives: from volunteer "burn out", for members feeling they have already financially contributed with their dues, from resistance to operate an artistic non-profit organization with sound business practices.

Measure: apply for one grant

- increase presence on social media, as measured by "followers" - increase from 60 to 500 on Instagram, increase the number of posts on Facebook (especially leading up to events)
- increase average attendance at our performances from approximately 200 to approximately 300
- increase corporate sponsorship to \$3500

Action: Determine financial feasibility of hiring two more professional section leaders by increasing KWCO's income by \$7000 annually, through increased ticket sales and corporate sponsorship/donations

Human Resources

Board of Directors

The Board of Directors must both set an example, and regularly publicize to members, new and continuing the expectations outlined in the KWCO policy and procedures brochure.

The Board of Directors should review annually the expectations for the membership in KWCO.

- President
- Vice President
- Secretary: Board Agenda and Minutes, job descriptions and board hierarchy/ subcommittee
- Treasurer: day to day operations, CRA reports, financial reports, budgets
- Accounting and Legal: Grants, fundraising, sponsorship, ticket sales; incorporation papers, policies and procedures, by-laws, declaration forms, musician contracts (conductor, concertmaster, section leader, soloists), consent to act as a director
- Music Director
- Concertmaster
- Internal and External Communication: Website, Social Media, newsletter, Photos, KWCO Archives, Marketing/ Advertising: Publicity Design, posters, brochures, concert programs, posting locations, reciprocal advertising, ads, articles broadcast media, email promo
- Special Events and Activities: Dinner concert, Chamber concert, Trip, Social Activities, Live at the Met, Retreat
- Concert Organization: Programming, library, venues, equipment set up, concert management, sectionals
- Personnel - Membership list, registration, surveys, Rehearsal scheduling, Soloists Liaison, Kiwanis Liaison
- Librarian
- Long Term Planning: Orchestras Canada, Growth, Vision, Marketing, Sponsorship Initiatives

Music Director

Since the majority of members of the orchestra are amateurs, it is crucial that we have a capable, inspiring person on the podium, one who will take a sincere interest in the artistic growth of the orchestra and will be actively involved in promoting the organizational health and welfare.

- shall display an ability to work with all amateur musicians in the orchestra while having the musical and technical ability to challenge the more skilled players
- shall receive an agreed upon salary
- shall be an ex-officio member of the board and shall attend board meetings and program committee meetings

- shall provide rehearsal schedules in advance to be sent out weekly by Personnel Manager
 - shall provide program notes for the selected music
 - must be someone who can promote the orchestra and bring in new members
 - choose music and guest artists and soloists for each concert
- a conductor search process includes the above criteria and the board must define the parameters of the search committees authority in the decision making process

Section Leaders

Concert master and Viola Section Leader play a vital leadership role in the orchestra, acting in a supportive role towards the conductor and the members. To encourage continued support of a high calibre, the positions should be paid on par with each other .

- new hires for section leader for second violins and cellos
- responsible for bowing, technique suggestions, decorum

Membership

In a community with many opportunities for professional musicians, the KWCO provides an opportunity for amateurs to play major symphonic works. Membership is open to any player who can read music and feels able to handle the repertoire (no auditions required).

From the beginning, participants of our orchestra have received no remuneration, with the exception of the conductor, concertmaster, certain section leaders, coaches, soloists and occasionally an extra player when required last minute. This policy distinguishes us from other orchestras operating in the community.

Each orchestra member is encouraged to purchase/ sell 4 tickets to each concert. Participation in fundraising is also encouraged. Code of conduct for rehearsals is outlined in our policies and procedures.

Volunteers:

- volunteers are a great way to encourage ownership and engage both the membership and the community
- encourage engagement with membership for volunteering on committees, selling tickets, putting up posters
- rotate snacks at rehearsals provided by sections
- KWCO needs full involvement and dedication from all members to reach the largest audience possible in terms of ticket sales and promotion of events
- ensure there is a recognition program for volunteers

Timeline

Year 1 2018/2019

- develop slate of goals and create 3 year plan

- develop data protection policy
- develop anti-harassment policy
- create and launch Instagram Account
- create and launch Twitter Account
- increase average concert attendance to 250
- launch commitment to youth: free entrance to concerts, targeted marketing to schools and music schools
- launch commitment to senior:
- creation of group rate promotion
- fundraiser: Openball and Silent Auction
- start Trip Committee
- increase price of adult entrance from \$18 - \$20

Year 2 2019/2020

- celebration of our 40th Anniversary of Orchestra - June 2020
- apply for Google Grant for Google Ads for Non-Profit
- work with Orchestras Canada to advocate funding for the Arts
- increase concert attendance to 275 patrons per concert
- launch sponsorship program
- increase corporate donations from \$500 to \$2000
- find an appropriate Grant and begin application process
- KWCO International Trip summer 2020

Year 3 2020/2021

- fundraiser: Viennafest and Silent Auction
- opening of new rehearsal space at Waterloo Rec Complex slated for summer 2021
- January 2021 - petition Board for slate of goals for next 3 Year Plan and have plan developed by June, 2021
- increase concert attendance to 300 patrons per concert
- increase corporate donations to \$3500
- apply for one grant