



WHAT IS EXCITING FOR THE MUSICIANS ABOUT THE STRATEGIC PLAN IS THAT IT PROVIDES A FRAMEWORK DESIGNED TO FOCUS THE ENTIRE ORGANIZATION ON THE GOAL OF EXCELLENCE IN ALL ASPECTS OF WHO WE ARE AND WHAT WE DO. IT ENVISIONS NEW PARADIGMS OF LABOR-MANAGEMENT-BOARD RELATIONS, IT RECOGNIZES THAT RISK IS AN IMPORTANT AND ACCEPTABLE PART OF THE GROWTH PROCESS, AND IT SETS FORTH A UNIVERSALLY AGREED-UPON SET OF STANDARDS GEARED TOWARDS GUIDING US TO A HIGHER LEVEL OF EXCELLENCE.

IT IS OUR FERVENT HOPE THAT THERE IS A LONG-TERM COMMITMENT TO THIS STRATEGIC PLAN THAT WILL ENABLE THE SPCO TO STAY ON THE COURSE, REGARDLESS OF WHAT CHANGES TAKE PLACE, AND ATTAIN THE EXCELLENCE AND STABILITY THAT WE ALL DREAM OF.

HERB WINSLOW
PRINCIPAL HORN



Lowell Noteboom, Chair

EXECUTIVE SUMMARY

INTRODUCTION & PURPOSE; PROCESS AND PARTICIPANTS

During 2001 and 2002, the SPCO family—Board, the Friends volunteer organization, Musicians and Staff—undertook a comprehensive strategic planning process, with the charge to develop a long-range vision and strategic plan for the SPCO. Using a conceptual framework rooted in the establishment of core institutional purpose, values and long-term goals (Big, Hairy, Audacious Goals—BHAGs), the planning participants have also identified eight key categories of implementation strategies to guide the organization over the next few years. The planning process was led by SPCO Board Chairman Lowell J. Noteboom, involved myriad numbers of meetings with SPCO constituents, subscribers, donors and community leaders, and had the benefit of two gifted outside consultants, Ronnie Brooks of St. Paul and Thomas W. Morris, executive director of The Cleveland Orchestra.

VISION STATEMENT PURPOSE, VALUES AND BHAGS

The Purpose for Which the Chamber Orchestra Exists
Providing innovative discovery and distinctive experience through the brilliant performance and vigorous advocacy of the chamber orchestra and chamber music repertoire.

The SPCO's Core Values
Excellence, Intimacy, Innovation & Continuity

BHAGs

Big, Hairy, Audacious Goals for the next 10 to 30 years

- To be widely recognized as “America’s Chamber Orchestra”
- To be clearly distinctive in purpose and artistic profile
- To be the symbol of cultural excellence in the Twin Cities

KEY PROGRAM INITIATIVES

The planning participants have agreed upon a series of initiatives for implementation during the next three to five years in eight areas of focus:

- Focus on Distinctiveness
- Focus on Clear Artistic Profile
- Stronger Roots at Home: Establish Regular Regional Residency Program
- Reconfigure National and International Presence
- Re-Emphasize Artistic Excellence
- Redevelop Media
- Strengthen Community Relationships
- Build the SPCO Organization

FINANCIAL INITIATIVES

The planning participants have agreed upon two essential areas of financial focus over the next three to five years:

- Special Funding
- New Endowment

NEXT STEPS

The planning participants agree that focused task forces are the best way for the SPCO organization to develop passion and consensus around key areas of SPCO program and organizational development.

- Endowment Steering Committee
- Venues Task Force
- National and International Initiatives Task Force
- Media Task Force
- Task Force on Broadening the Community Reach of the SPCO

CONCLUSION & APPENDICES

The planning participants believe that this process has been enormously successful in answering its charge to define the meaning of “taking the SPCO to the next level.” The plan was unanimously adopted by the SPCO Board of Directors on May 15, 2002.





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INTRODUCTION AND PURPOSE

Under the aegis of a grant from The Andrew W. Mellon Foundation, the SPCO has undertaken a comprehensive planning process during 2001 and 2002. The purpose of the process was to define and build consensus around a vision for the SPCO's future, and to provide a long-term strategic context for annual initiatives. The participants in the planning process were tasked with defining the Board's charge to "take the SPCO to the next level." This challenge was issued by the Board to the whole organization in 1999, at the time when executive and artistic leadership changes were about to take place. This document summarizes the conclusions reached.

In articulating admittedly aggressive goals as part of the SPCO vision statement, the hope is to stimulate significant progress toward them over the next seven years, culminating in the 50th anniversary celebration of the SPCO in 2009. While the vision statement paints a picture of the SPCO 10 to 30 years out, the plan itself focuses on the 50th anniversary as a key milestone for the Chamber Orchestra. This plan repeatedly uses that anniversary as an important time frame for the efforts outlined herein. Most of the actions outlined in this plan will be initiated during the next three to five years.

SPCO Timeline

1959	1969	1972	1973	1980	1986
Founding Music Director Leopold Sipe hired	Stephen Sell begins as General Manager	Dennis Russell Davies begins as Music Director	James Howland begins as General Manager	Pinchas Zukerman begins as Music Director	Deborah Borda begins as Managing Director



PROCESS AND PARTICIPANTS

The process was by design highly inclusive, and allowed for the complexity of the SPCO's challenges and the sometimes competing interests of the constituencies represented. By the end of the process, the SPCO community had learned a great deal about its many challenges and opportunities. **There is a strong consensus around the values, goals and initiatives that have resulted.** Several issues that developed in the course of business temporarily distracted the participants from agreeing on initiatives and next steps. For example, contract negotiations in the spring of 2001, a protracted and difficult budget process for FY02, and the financial challenges of the post-September 11 recessionary environment, tested the participants' ability to focus on the long-term goals. This planning document, in addition to articulating areas of agreement, outlines several open questions about the SPCO's future. It should also be noted that this plan document attempts to remain "at 20,000 feet." It consciously avoids any attempt to outline tactical approaches to reaching the goals. It remains a strategic plan, not a business plan.

1988	1992	1994	1999	2000	2001-2002	2009
Artistic Commission formed: John Adams, Creative Chair	Hugh Wolff begins as Music Director	Crisis and rebirth: MPR Radioathon	Bruce Coppock begins as Managing Director	Completion of \$20 million Endowment Campaign	Andreas Delfs begins as Music Director	50th Anniversary
Christopher Hogwood Director of Music		Brent Assink begins as Managing Director			9th consecutive balanced budget	
Hugh Wolff Principal Conductor					No debt for 5 years	



VISION STATEMENT

The core of this plan document is the SPCO's vision statement, which forms the context for all initiatives to be undertaken in the foreseeable future. It represents a radical departure from the SPCO's historical aspirations and behavior, and reaching for it will require a fundamentally greater and more sustained commitment toward the SPCO's envisioned future than ever before. It will require a deeper commitment to excellence and a zealous belief in the SPCO's future. It will require much deeper self-recognition and willingness to change than ever before. It will require that the SPCO do different things, and do things differently from before. It will require significant funding, including transformational leadership giving by the SPCO's core supporters. Moreover, it will require the unbridled belief in the SPCO's ability to transform itself. It will be painful and daring at times.

We believe passionately that this vision is achievable over a 10- to 15- year period. But commitment to long-term goals will require bold initiatives to be set in place now while their eventual outcomes may occur well past the tenures of many of the present decision makers. Moreover, breaking the traditional modes of labor-management-board interaction will require vastly improved communication, development of higher trust levels, and sustained concentration. At the same time, the Board will have to undergo a seminal transition from enthusiastic supporters to passionate and generous advocates of the vision.

THE SPCO'S PURPOSE

Providing innovative discovery and distinctive experience through the brilliant performance and vigorous advocacy of the chamber orchestra and chamber music repertoire.

THE SPCO'S CORE VALUES

Excellence: Striving for peak performance individually and collectively throughout the organization.

Intimacy: Striving to create powerful, deep connections between and among performers and audiences through music; fostering close collaboration and respect among all internal constituencies.

Innovation: Aspiring toward versatility and the ability to invent and do whatever is needed; being willing to risk failure.

Continuity: Aspiring intentionally to stay the course in pursuit of long-term goals.

BHAGS: BIG, HAIRY, AUDACIOUS GOALS FOR THE NEXT 10 TO 30 YEARS

To be widely recognized as “America’s Chamber Orchestra”

- Sold-out series in key American cities of artistic significance
- Unavoidable presence at major world festivals and concert halls
- Regular high-profile European touring
- Unanimous national and international critical acclaim
- The international organization of choice for special artistic projects

To be clearly distinctive in purpose and artistic profile

- Clear and focused profile as a chamber orchestra, not a symphony orchestra: three discrete repertoires (Baroque, Classical Viennese, Music of Our Time) with distinctive performance styles.
- Serving the community and music in myriad ways: education, community service, collaborations, technology; extensive community engagement, outreach and education
- Innovative labor relations, and willingness to do business together in non-traditional ways
- Strong centers of concert and program activity in both Saint Paul and Minneapolis

To be the symbol of cultural excellence in the Twin Cities

- Enthusiastic, trusting and overflowing audiences
- The symbol of excellence in the community
- Center of the community’s broader psyche
- The SPCO Board is the board of choice
- Endowment to operating costs in ratio of at least six to one
- Robust financial foundation of annual revenues that support artistic initiatives, both local and international
- Own or control a distinctive, innovative and acoustically superior facility (or facilities) that supports the SPCO’s unique repertoire profile and acts as a magnet for superlative musicians, composers and conductors, administrators, board members and audiences.





KEY PROGRAM INITIATIVES

A central challenge of this planning process has been to develop consensus around key initiatives for the years leading up to the SPCO's 50th anniversary in 2009. These initiatives cut across the values and goals outlined in the vision statement. These specific initiatives, some already well underway, will solidify the SPCO's distinctive place in the Twin Cities' cultural constellation over the next few years.

FOCUS ON DISTINCTIVENESS

The SPCO's core challenge in the Twin Cities cultural market is to be seen as distinctive in artistic purpose and profile, in particular vis-a-vis the Minnesota Orchestra. By operating in the only metropolitan market in the U.S. with two major orchestras, the SPCO must, through program and venue choices, make itself as distinctive from the Minnesota Orchestra, as the Walker Art Center is from the Minneapolis Institute of Arts. Both nationally and locally, the SPCO will benefit enormously from greater clarity around its artistic identity and purpose. Distinctiveness has three key aspects—the intentional size of the SPCO, its repertoire and programming, and significantly, where the SPCO performs, as noted below.

The Central Home for the SPCO

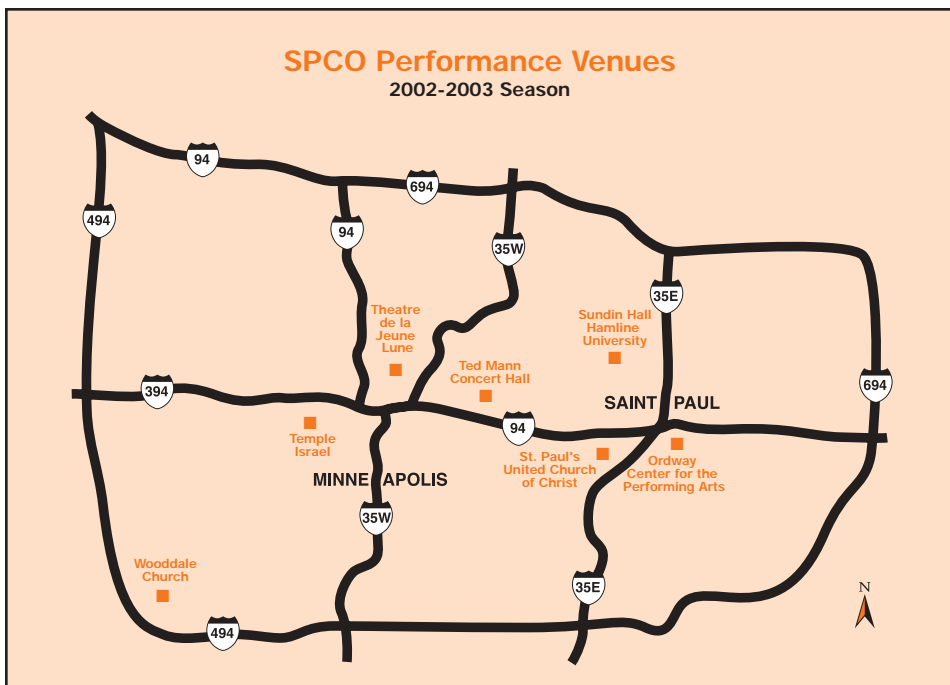
For now, the question of whether the SPCO should aspire to perform in a central home remains unresolved. Some planning participants feel that a distinctive home (perhaps modeled on the Cité de la Musique in Paris) would galvanize the community around the SPCO; others feel that the SPCO's very distinctiveness and competitive advantage resides in its multiple venue strategy; still others feel that these are not mutually exclusive approaches. For the near term—5 to 10 years—the SPCO is committed to continuing its multiple venue strategy, without ruling out the possibility of securing a superior and distinctive facility of its own in the long term. There is too much institution-building to be accomplished before a credible hall-building project can be undertaken.

Intimate Venues

No value resonates more deeply, inside and outside the SPCO organization, than that of intimacy. Intimate, interactive musical relationships among musicians and between the Chamber Orchestra and its audiences define the very being of the SPCO. The refrain of “if we are not a symphony orchestra, why do we play in symphony halls?” was heard throughout the planning process. Acknowledging this, the SPCO is committed to performing in intimate venues, having identified halls of 1,000 to 1,500 seats as the ideal size for the SPCO performances. Intimate venues will reinforce the special and magical relationship between audience and the orchestra. Intimate venues with high-quality acoustics will enliven the scintillating detail of the Chamber Orchestra and chamber music experience. Such venues will make the SPCO sound fuller, more immediate and brilliant, turning its intentional smallness into a powerful and positive force.

Superior Acoustics

The SPCO’s struggle for distinctiveness resides in part in the acoustical properties of the halls in which it performs. The subjective nature of acoustical perception, and the subliminal negative impact of poor acoustics on the listener, makes this subject difficult for lay audience members to appreciate. “You don’t know what you don’t know” applies to acoustical properties; equally, “you know it when you see (hear) it” pertains. Greater organizational focus on insisting upon superior acoustics at its performance locations will result in greater public understanding and appreciation of the SPCO musical experience.



Thrust Stage at the Ordway Center for the Performing Arts

As a multi-purpose facility, the Ordway necessarily makes significant acoustical compromises to accommodate its dual function as a musical and theatrical space. In addition, its size of 1,900 seats mitigates against creating an intimate musical experience, despite its beautiful interior. Its superior public spaces make it a destination venue, however, making the Ordway work for the SPCO is an essential imperative for the organization. Extending the stage 21 feet into the audience will accomplish two key objectives: reduce the distance and formality of a conventional orchestral shell setup, and improve the resonance and immediacy of the acoustics by placing the orchestra and the audience into the same room during concerts. Further acoustical experimentation will need to be undertaken during the next two years to improve the on-stage acoustics for the musicians and to increase the clarity and quality of sound for the audience.

Performing at Ted Mann Concert Hall at the University of Minnesota

Ted Mann Concert Hall is a nearly ideal space for the SPCO. It meets the twin litmus tests of superior acoustics and intimate environment. Its location on the University campus presents opportunities for development of new audiences and programmatic integration with the University community. Conversely, its location “in between” downtown Minneapolis and downtown Saint Paul, and its comparative obscurity in the public’s awareness dictate the need for sustained, concerted efforts to build audience loyalty to the hall, by removing barriers such as inconvenient parking and drop-off, insufficient signage, and less than professional customer amenities. With its seating capacity of 1,200 and brilliant acoustics, Ted Mann should become an SPCO destination venue within three years. Combining the Sunday Orchestra Hall series and the Sunday Ordway series at Ted Mann has already provided a strong subscription base from which to build.

Eliminating the Orchestra Hall Series

Despite its superior acoustics, prestige and prime location in downtown Minneapolis, Orchestra Hall is a hall for symphony orchestras, not chamber orchestras. At 2,400 seats, it is simply too large to serve the SPCO’s imperative of intimacy. It only invites inappropriate comparisons which do not serve the goal of differentiating the SPCO’s artistic profile from that of the Minnesota Orchestra.

Downtown Minneapolis Location

The elimination of the Orchestra Hall series increases urgency for the SPCO to identify and establish its presence at another performance location in downtown Minneapolis. With its continuing commitment to a multiple venue strategy, the SPCO must now focus on developing a Minneapolis home to complement its Saint Paul, University and neighborhood homes.

SPCO Competition Matrix

BAROQUE ENSEMBLES

GROUP	FOUNDING DATE
Academy of Ancient Music	1973
Boston Baroque	1973
Concentus Musicus Wien	1953
Concerto Köln	1985
English Baroque Soloists	1978
Handel & Haydn Society	Founded 1815 – All Baroque as of 1986
Musica Antiqua Köln	1973
Orchestra of the Age of Enlightenment	1986
Orchestra of the 18th Century	1981
Philharmonia Baroque Orchestra	1981
Tafelmusik	1979

CHAMBER ORCHESTRAS

Academy of St. Martin in the Fields	1959
Chamber Orchestra of Europe	1981
Deutsche Kammerphilharmonie	1987
English Chamber Orchestra	1960
Los Angeles Chamber Orchestra	1969
Mahler Chamber Orchestra	1997
Mostly Mozart Festival	1964
National Arts Centre Orchestra	1969
Orchestra of St. Luke's	1979
Orpheus Chamber Orchestra	1972
Scottish Chamber Orchestra	1974

CONTEMPORARY ENSEMBLES

American Composers Orchestra	1975
Asko Ensemble/Schönberg Ensemble	1985
Bang on a Can All Stars	1987
Ensemble Intercontemporain	1976
Ensemble Modern	1987
Eos Orchestra	1995
London Sinfonietta	1968
Los Angeles Philharmonic New Music Group	1995

Note: These ensembles are listed in alphabetical order.

FOCUS ON CLEAR ARTISTIC PROFILE/EYE ON THE COMPETITION

Throughout the planning process, the committee struggled with the challenge of defining the SPCO without saying what it is not: a symphony orchestra. Ultimately, we focused on establishing greater clarity about key aspects of the SPCO's artistic profile.

Size and Repertoire: Intentionally Focused on Viennese Classical School, Baroque Music, and Music of Our Time

Intentionally sized at fewer than 40 musicians, the SPCO “owns” segments of the repertoire not often performed by symphony orchestras: a broad array of the Viennese Classical School (Mozart, Haydn, Beethoven), Baroque Music, and music of our time (the vast repertoire of 20th century and new music). Each of these repertoire areas deserves further commentary, from the multiple perspectives of leadership, stylistic challenges, and national and international competition.

- **Viennese Classical Style.** The SPCO is, at its core, a classical Chamber Orchestra. A performance standard for the Viennese Classical repertoire differs from Baroque style with regards to bowing, articulation, sound color, balance between winds, brasses and strings, choice of certain instruments, etc. Andreas Delfs is particularly strong in classical repertoire. He will need to work with the Chamber Orchestra in rehearsals, concerts, recruitment and choice of guest conductors and soloists to develop greater consistency of approach. The SPCO has international competition from classical ensembles such as the Orchestra of the Age of Enlightenment, The Chamber Orchestra of Europe, the Orchestra of St. Luke's, competition which did not exist 25 years ago.
- **Baroque Music.** Since the mid-seventies, stylistic specialization based on historically-informed performances on original (Baroque period) instruments has become the standard for the performance of Baroque music. Under Nic McGegan's leadership, the SPCO has the stylistic challenge of becoming competitive as a “historically-informed, modern instrument” Baroque orchestra. This will require consistent focus on the choice of guest conductors (specialists in historically-informed performance practice) and on stylistic practice (articulation, choice of instruments, use of vibrato, phrasing etc.) The SPCO faces tough competition from Baroque specialty orchestras such as Tafelmusik or Musica Antiqua Köln that barely existed when the SPCO rose to prominence 25 years ago.

- **Music of Our Time.** The newer chamber orchestra repertoire is extraordinarily rich, and continues to be an important area of output for so many composers. Accordingly, devoting greater focus to this repertoire is an essential building block in clarifying the SPCO's artistic profile. A vital aspect of developing this profile will be a deeper commitment to commissioning and, equally important, a commitment to repeat performances of past commissions and other works composed during the past 25 years. The SPCO will also need to strengthen its commitment to new work by regularly engaging important new music specialists and composer/conductors. Perhaps the most exciting aspect of this renewed commitment to the music of our time is the enormous opportunity this provides for the SPCO to develop new audiences. Staying "ahead of the curve" to stimulate audience interest, the SPCO can forge an even more vibrant relationship with its audiences. The stylistic issues in this repertoire are more diffuse than in the Baroque and Classical styles: virtuosity, timbre (sound) and rhythmic acuity, and passionate commitment to the music itself are key. Standout ensembles such as the Bang on a Can All Stars, the London Sinfonietta, ASKO/Schönberg Ensemble or the Ensemble Modern perform this music with astonishing commitment and aplomb, and represent strong international competition for the SPCO.

As the only chamber orchestra in the world that attempts to "do it all," the SPCO will need to focus very intentionally on developing multiple specialty voices appropriate to each repertoire. This will require a shift from simple flexibility—the ability to play anything very well—to true versatility—the ability to perform with stylistic authority and insight in multiple styles. Careful selection of guest conductors and the matching of repertoire with their strengths are important strategies. Developing strong relationships with the right conductors—a result of close collaboration between musicians and management, as well as aggressive recruitment will bolster the SPCO's stylistic focus and help position the Chamber Orchestra well for future artistic leadership. Distinct focus on stylistic issues will be essential for SPCO musicians. Simply playing very well does not suffice in the context of the SPCO's international aspirations; playing with extraordinary commitment and insight in three distinct styles must be the SPCO's goal.

Programming: Utilizing the Unique Resources of the SPCO

Because of the intentionally small size of the SPCO, and because so many of the SPCO's players have deep roots in the chamber music repertoire, the SPCO's artistic identity can be further enriched by programming that would require greater variety in the size of ensemble presented on stage. Strengthening the main series commitment to the large chamber repertoire—for 10 to 25 solo players—will serve several purposes: programming distinctiveness, musician job satisfaction and recruitment, and the quality of the orchestra's performance. Increased programming of concerti using SPCO musicians as soloists will also aid in strengthening the repertoire, quality of performances and musician recruitment.

STRONGER ROOTS AT HOME: ESTABLISH REGULAR REGIONAL RESIDENCY PROGRAM

The SPCO's deep roots in the upper Midwest are a product of its repeated concert and residency appearances throughout Iowa, Wisconsin and Minnesota. These relationships are of central importance to the SPCO's development. Focus should shift from broad-range national touring to making a stronger investment in our region. The somewhat sporadic nature of these appearances has diluted the sense of ownership that the region's communities feel toward the SPCO. The SPCO must develop more focused strategies to build deeper relationships in several communities.

Series in Key Regional Cities

Rochester, Stillwater, Northfield, Ashland, St. Cloud, Duluth, Wabasha and Fargo are obvious candidates for the SPCO to develop a stronger regional presence. Development of local advocacy committees is the best strategy for the SPCO to use to develop a group of annual subscription series in these and other key regional cities. Local sensibilities must be taken into consideration in developing these series. Understanding local dynamics will be essential, so that the SPCO is not in overt competition with local musical organizations.

Regular Annual Appearances in Regional Cities

There are several cities in the region (Buffalo, Winona, Princeton and New York Mills, among others) where the SPCO has quite successfully made regular appearances, often in conjunction with residency and educational activities. It is important for the SPCO to develop stronger, more regular relationships with presenters in these cities.



RECONFIGURE NATIONAL AND INTERNATIONAL PRESENCE

Touring, once a staple of the organization's annual activities, has become more sporadic and difficult. In the United States, the reduction in the number of presenters nationwide and the increased specialty chamber orchestra competition has made SPCO touring less reliable. In Europe, the greater preponderance of high-quality chamber orchestras makes high profile touring more challenging. As America's Chamber Orchestra, we will require sustained investment and presence in cities of artistic significance, both in America and Europe. This plan contemplates a sustained focus on a few American cities and on building a stronger presence in Europe. Programming—carefully conceived and positioned—will be critical in garnering new levels of interest in the SPCO. Special attention will need to be given to making appropriate venue choices: intimacy and immediacy of the SPCO experience is as essential outside of the Twin Cities as it is at home. There are five aspects to this initiative.

Eliminate Smaller Cities Outside our Home Region

Playing in regional cities throughout the country is no longer a viable, productive or profitable strategy, if it ever was. It does not build the reputation of the SPCO in cities where critical opinion counts. It distracts time and attention from reputation building, and as importantly, from developing stronger neighborhood and regional relationships closer to home.

Chicago

Other than New York, Chicago is the most important musical city in America. It is close to the Twin Cities, there is no significant chamber orchestra presence there, and there are multiple potential presentation partners. All of these factors point to the need to begin building a strong, regular presence in Chicago. Potential partners include Symphony Center, The Music and Dance Theatre, the Ravinia Festival, Northwestern University and the University of Chicago. This plan calls for regular SPCO performances in Chicago, eventually developing into an SPCO sponsored subscription series.

New York

No city is more important to the long-term career development of the SPCO than New York. Developing a regular presence in New York City in halls that are appropriate for showcasing the multiple artistic missions of the SPCO is an essential part of the SPCO's development.

Other Major American Cities

In the long term, developing a regular presence in other key American cities (Boston, Washington, San Francisco and Los Angeles, among others) should follow on the heels of solid development in Chicago and New York. In the near term, securing touring engagements in those cities is the best strategy for the SPCO.

Europe

A combination of regular winter-season touring in front-rank European cities, combined with European festival appearances, is critical in developing the SPCO's European profile.

RE-EMPHASIZE ARTISTIC EXCELLENCE

No single issue is more important to the future of the SPCO than artistic excellence. While it means many different things to different people, actively promoting the artistic excellence of the Chamber Orchestra is the central aspiration of every constituency in the organization. Four specific areas deserve commentary.

Regular Additional Musicians

An extremely emotional issue for all involved in the planning discussions has been the size and configuration of the Chamber Orchestra. In particular, the positions of 2nd flute, 2nd trumpet and 2nd clarinet are currently non-contract, non-fulltime positions. All parties agree that it is essential to come to prompt resolution of this issue. It has been a disproportionate distraction for far too long.

Recruitment

The SPCO has recruitment challenges. Maintaining a large audition pool and retaining top quality players are key concerns. Focus on positioning the SPCO as more than just a small orchestra job, and delivering the highest quality musical environment, will be essential.

Preparation and Rehearsals

The new level of stylistic demands on the Chamber Orchestra will require greater allocation of services to rehearsals and sectionals. The move from four to five rehearsals weekly for Masterworks performances, and occasionally three to four for Baroque performances, is a step in the right direction.

Artistic Development Opportunities

Making more investment in the artistic development of SPCO musicians will be an important aspect of developing a better orchestra. Continuing the tradition of concerts without conductor, increased chamber music (unconducted repertoire of fewer than 10 players) and solo recital and concerto opportunities will help to develop the artistic skills of the Chamber Orchestra musicians. This plan also strongly endorses more active encouragement of a variety of professional and artistic development opportunities for SPCO musicians, both inside and outside the SPCO organization, bearing in mind the critical responsibility each musician has to the Chamber Orchestra as a whole.

REDEVELOP MEDIA

The media presence of the SPCO has become stagnant. With the myriad changes in the recording and public radio environments, and with the fundamental technological changes in media delivery of recorded music, the SPCO will have to become much more proactive in its approach to media. Following adoption of the plan, a media task force should explore SPCO alternatives thoroughly.

MPR Relationship

The SPCO relationship with Minnesota Public Radio is an important and fundamental one for the organization. Locally, MPR and its affiliates serve the SPCO extremely well. Nationally, distribution is widespread but is conspicuously absent from major markets. Gaining access to major markets—New York and Chicago, among others—is important to bolstering companion efforts to establishing concert presence. Fortunately, the cost of broadcasts is low, thanks to MPR’s provision of all production and recording of the broadcasts.

Internet

Delivery of recorded music over the Internet has made a lot of progress over the past 18 months. The SPCO must create a presence on the net. Ready access to SPCO performances, broadcast and commercial, through downloading and streaming is essential. The opportunities and vehicles now exist for a viable and sustainable Internet presence. The SPCO Media Task Force should focus on developing these opportunities.

SPCO Media Company

The SPCO should explore the creation of its own media company for the production and distribution of recorded material, through the internet or through traditional media. Recent publicity about new initiatives at the London Symphony and the San Francisco Symphony demonstrate the possibilities of “going it alone;” conversely, no American orchestra has yet developed a viable financial and contractual model for an independent media company. Caution and creativity will be essential as the SPCO considers this initiative.

Twin Cities Public Television Relationship

There is an opportunity for the SPCO to develop a relationship with TPT to parallel its relationship with MPR. Developing a sustainable television presence locally and regionally will raise the profile of the SPCO considerably.

Contractual Media Arrangements

The nature of contractual arrangements for musicians in many areas of media constrains SPCO ability to develop media projects. It is imperative that SPCO musicians and management develop contractual solutions to these constraints.



STRENGTHEN COMMUNITY RELATIONSHIPS

The SPCO enjoys deep roots in the communities that know it. The orchestra is remarkably unknown, however, beyond its home cultural community. Several ongoing initiatives must be undertaken to raise the profile of the SPCO in the broader Twin Cities community.

Education Programs

The SPCO operates two fine educational programs: CONNECT and *Musical U*. CONNECT is a K-6, curriculum-based program that operates in 17 Minneapolis and Saint Paul schools. It is a solid and well-established program. Limited access to musician services and financial constraints prevent the broadening of its reach beyond its current member schools. The SPCO must examine ways to extend its reach to suburban, parochial and private schools in order to achieve greater impact. The SPCO also offers childrens' concerts programmatically linked to the CONNECT curriculum. The SPCO should investigate broadening its educational reach through concerts and in-school appearances in areas beyond inner city Saint Paul and Minneapolis schools. The *Musical U* adult education program operates on a fully funded basis under a grant from the Miami-based Knight Foundation. While novel in its approach, and effective among the 50-150 participants who attend it regularly, the future of *Musical U* must be thoughtfully examined in the context of its effectiveness as an audience development tool and the expected sunset of the Knight Foundation support after FY04.

Civic Celebrations

Scheduling and the difficulty of developing compelling outdoor programming make traditional July 4th-type concert appearances impractical for the SPCO. The SPCO must find ways—such as the recent performance at the Mayor's inauguration—to weave itself more fully into the fabric of community life in the Twin Cities. Gubernatorial inaugurations, the opening of the legislature, *Cinco de Mayo*, the Winter Carnival, Capital City New Year and the Chinese New Year, among others, all provide good opportunities for the SPCO.

Neighborhood Councils

The SPCO has done little to develop strong advocacy groups in the neighborhoods in which it performs regularly, much less in communities where it ultimately has no presence. There is rich opportunity for the SPCO to develop much deeper advocacy for the organization by establishing a program of neighborhood councils, specifically designed to support concert and educational activities in the neighborhoods.

Institutional Linkages

The SPCO has enjoyed collegial and occasional cooperation with a number of organizations throughout the Twin Cities. In order to accomplish the larger goal of being “at the center of the community’s broader psyche,” the SPCO must pursue stronger, more formalized program linkages with a variety of organizations: the Greater Twin Cities Youth Orchestras, the Minnesota Youth Symphonies, The MacPhail Center for the Arts, the University of Minnesota and other institutions of higher education, churches and religious organizations, museums and theatre companies. The SPCO must also develop meaningful artistic collaborations with the Minnesota Orchestra, the Walker Art Center, the Guthrie Theatre and The Minneapolis Institute of Arts. An essential measure of the SPCO’s growth into a more widely acknowledged community asset will be its ability to forge strong and durable relationships with institutional partners.

50th Anniversary Committee

With its 50th anniversary in 2009, the SPCO has the opportunity to develop a series of major program and public relations initiatives. A committee of community leaders, Friends of the SPCO and Board members should be formed to plan a series of events leading up to the anniversary season in 2009.

BUILD THE SPCO ORGANIZATION

As an organization, the SPCO has suffered over the years from episodic leadership at the board and management levels. Since the crisis in 1993, the organization has made major strides toward stability. Taking the organization to the next level will require nearly as much effort as taking the artistic profile to a higher level. There are several key initiatives.

Governance

- **Build the Board.** The SPCO benefits from the loyal devotion of a comparatively small group of board members. The Board committees all function effectively, and Board giving has more than doubled during the past two years to an average annual gift of more than \$9,000. While the Board has become much stronger during the past five years, there is much work to be done in developing a board with even greater influence and power in Minneapolis and Saint Paul. Focus on recruitment, engagement and involvement will be essential building blocks, as will intentional focus by the Board on its own roles and responsibilities in the SPCO organization. The organization’s strength and standing in the community will be measured mostly by the strength and commitment of the Board.

- **The Governing Members.** A key companion strategy to board building will be the development of the “next rung” of SPCO supporters through the development of the Governing Members. This group is designed to engage donors of \$2,500 and above more actively in the work of the SPCO through involvement in non-fiduciary committees, the electing of SPCO Board members and broadening the reach of the organization throughout the community. The initial year’s recruitment of 65 Governing Members is an encouraging sign; a target of 150 members has been set for FY04.
- **The Friends of the SPCO.** Despite the many changes in volunteer associations across the country, the Friends of the SPCO have remained very stable, and have had the benefit of committed leadership. The Friends provide very important linkages to the community, and have expressed keen interest in greater involvement in many of the initiatives of this plan. SPCO management and Board should work to maintain the Friends as an important part of the SPCO family.

Management

Historically, the management of the SPCO has been unsettled. Average tenure among senior and second-level management has been short by industry standards. Current members of the Chamber Orchestra can remember at least 10 SPCO presidents during the last 30 years. Average tenure for development and marketing personnel has been even shorter. Recent investments in recruiting more experienced staff at competitive salaries, especially in the middle management positions, show signs of greater sustainability. Sustaining SPCO management positions as career jobs rather than “starter” jobs, and ensuring the efficient and effective execution of management responsibilities over the long term will be essential for this plan to come to fruition. The nearly constant turnover in management surely underlies some of the musicians’ wariness about significant changes in SPCO focus.

Organizational Culture

Throughout the planning process, there has been much discussion about the institutional goals of fostering a more collaborative culture and engendering more participatory problem-solving within and among all SPCO constituencies, including the Board, management, musicians and Friends. Successful pursuit of these goals mandates deep mutual understanding of the goals, opportunities and constraints within and between each constituent group; more aggressive, early, ongoing and open communication throughout the organization; and an acknowledgment that all constituent groups together must be held accountable for the overall institutional success.





FINANCIAL INITIATIVES

The SPCO has had enormous financial challenges since its founding. Its first 35 years saw innumerable financial crises, the most recent in 1993, when bankruptcy was seriously considered. Since then, extremely tight expense control, improved annual fundraising and a successful \$20 million endowment campaign have led to nine consecutive balanced budgets. The fact remains, however, that the SPCO is tenuously financed. The most essential initiatives of this plan are those to develop a strong, sustainable financial base of support for the organization.

CAPITALIZE THE SPCO

All of the plans outlined in this document will depend upon successfully capitalizing the SPCO at levels competitive with sister Twin Cities organizations and the best orchestras around the country. Two funding initiatives will determine the SPCO's ability to carry out this plan. The Endowment Steering Committee of the Board is charged with developing a detailed endowment campaign strategy by December 31, 2002.

Special Funding

The key to sustaining the SPCO at its current levels will be raising \$10-12 million to bridge the endowment shortfall for the years FY02 through FY09. Annual requirements will be as high as \$2.3 million in FY03, tapering down to zero by FY09. Securing the initial three-year funding requirement of \$6 million for FY02 through FY04 by the end of calendar year 2002 will in large part determine the viability of the SPCO *at its current level of operation* for those years. Securing the second \$6 million for the years FY05 through FY08 will depend in large part on very substantial progress toward the \$50-75 million endowment goal.



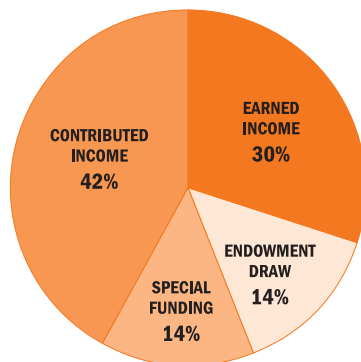
Endowment

The SPCO is under-endowed. The Finance Committee of the Board has agreed upon the following annual revenue model:

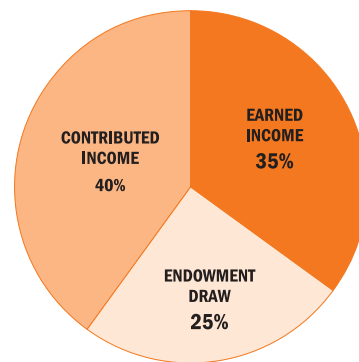
- 35-37% from tickets and fees (earned income)
- 40% from Annual Fund
- 25-30% from endowment draw

Currently the endowment provides only 14% of annual revenues. This puts enormous pressure on earned revenue and the annual fund, and requires ongoing efforts to secure special (bridge) funding. It also severely limits the expense budget of the Chamber Orchestra, below manageable levels in many cases. This is not sustainable in the context of the agreed-upon vision for the organization and the innumerable initiatives that need to be undertaken for long-term development. At a minimum, \$50 million in new endowment will be required to support the current level of operations without annual special funding.

CURRENT FINANCIAL MODEL



OPTIMAL FINANCIAL MODEL







NEXT STEPS

To maintain focus and momentum on the initiatives of this plan, task forces, staffed appropriately from all constituencies of the SPCO, should undertake further work in key areas to determine specific plans for the next few years.

Endowment Steering Committee

An Endowment Steering Committee should be formed to develop specific plans for the next endowment campaign, as called for in the resolution of the SPCO Endowment Task Force, approved at the February 6, 2002 Executive Committee meeting. The Steering Committee will make a recommendation to the SPCO Board of Directors about the size, duration, leadership and strategies of the next campaign. While the financial projections of this plan have identified a campaign range of \$50-75 million to be raised by FY09, the Steering Committee will be charged with refining the goal for the campaign. This committee should include representatives from all SPCO constituencies.

Venues Task Force

A Venues Task Force should be formed to study a range of venue issues for the SPCO. This task force should include representatives from all SPCO constituencies, with strong representation from SPCO musicians and the artistic leadership. It should make a series of recommendations to the SPCO Board of Directors about two specific issues:

- Ordway reconfiguration and acoustics
- Possible development of a venue in Minneapolis

National and International Initiatives Task Force

In order to develop a sustainable, multiple-concert presence in Chicago, New York and Europe, an SPCO task force should be formed to evaluate performance venues, organizational partnerships, positioning, and funding opportunities for a vibrant SPCO performance presence in those locations. While developing a plan for Chicago, beginning in the 2003-2004 season, is the most immediate imperative, the long-term high-profile project development requires steady attention.

Media Task Force

As noted above, a wide range of media opportunities and issues should be studied and evaluated with the goal of re-establishing, and reconfiguring, the nature of the SPCO's media presence. The Media Task Force should make a report to the SPCO Board of Directors by December 31, 2002.

Task Force on Broadening the Community Reach of the SPCO

Given the enormous and untapped opportunities for broader SPCO involvement in the community, a task force should be formed with a mandate to report back to the SPCO Board of Directors by December 31, 2002. There are several areas of focus:

- Neighborhood Councils
- Universities, Colleges and Schools
- In-School Programs
- Civic Celebrations
- Cultural Institutions
- Other Organizational Linkages

OTHER ISSUES FOR FURTHER STUDY

Several other issues deserve special study, either through the existing board and orchestra committee structure, or through the formation of additional task forces. These issues, notably the artistic growth of the SPCO and regional program development among others, must remain high priorities for the organization. The Strategic Planning Committee strongly endorses the use of issue-oriented task forces as an important method for sharpening the SPCO's response to important issues.



CONCLUSION

This planning process has been extremely thorough and inclusive. It has delved into myriad aspects of the SPCO's past, and has aggressively defined a bright, envisioned future for the organization. By living its current realities while developing a powerful and different vision for the organization, participants have often felt the conflict between the SPCO's limited organizational capacity and its enormous potential for growth. Truly living values nominated by the participants—Excellence, Intimacy, Innovation and Continuity—will challenge this organization as never before. Achieving substantial success in these efforts by the 50th anniversary year in 2009 will be the result of a fundamental shift in the SPCO's belief in itself and its capacity to engage the Twin Cities cultural community.

As intentionally audacious as the SPCO's vision statement is, the participants fervently believe that now is the time for this organization to establish itself as a leading arts organization in the Twin Cities and pre-eminent chamber orchestra in America.

The SPCO wishes to thank The Andrew W. Mellon Foundation for its generous support of this process, and the artistic and organizational development of the SPCO. In addition to thanking the members of the Steering Committee for hours of tireless work, the SPCO wishes to thank Lowell J. Noteboom for leading an extraordinarily candid, complicated and extended planning process, from start to finish.





ATTACHMENT 1

PARTICIPANTS

Strategic Planning Steering Committee
Lowell J. Noteboom, Chair

Board

Lowell J. Noteboom
Donald H. Birdsong
A. J. Huss, Jr.
James E. Johnson
Erwin A. Kelen
Sallie Lilienthal
Terry T. Saario

Musicians

Steven Copes
Peter Howard
Layton James
Alice Preves
Charles Ullery
Herbert Winslow

Staff

Bruce Coppock
Andreas Delfs
Barry Kempton
Jon Limbacher
Beth Villaume

Friends of the SPCO

Mary Frederick (2000-01)
Sherry Spence (2001-02)
Karen Larsen (2001-02)



ATTACHMENT 2

MEETING LIST

Strategic Planning Steering Committee

September 21, 2000
November 6, 2000
November 7, 2000
November 13, 2000
November 27, 2000
December 11, 2000
January 8, 2001
February 12, 2001
September 24, 2001
October 22, 2001
December 13, 2001
March 25, 2002

Town Hall Meetings

February 22, 2002
February 23, 2002
March 16, 2002
March 17, 2002
March 20, 2002
March 21, 2002
March 23, 2002
April 5, 2002
April 25, 2002
April 26, 2002
April 27, 2002
May 4, 2002
May 5, 2002

Institution-wide Retreats

September 18, 2000
January 29, 2001
October 15, 2001

Patron Focus Group Meetings

April 9, 2001
April 11, 2001
April 12, 2001
April 18, 2001
April 28, 2001
May 3, 2001

Musicians Retreat

January 29, 2002
May 8, 2001

Executive Committee Meetings

April 3, 2002
May 1, 2002

Special Board Meeting

May 15, 2002