



The Temecula Valley Symphony Strategic Plan 2022

A NEW BEGINNING

OCTOBER 21, 2022

Vision

We believe that the Temecula Valley Symphony has both the ability and the opportunity to become the regional symphony orchestra serving the greater rate symphonic music and would become a community resource, seeking strategic alliances with local business, government, and other arts organizations. TVS has served the Temecula area for 25 years and now stands poised to grow into the symphony orchestra the Temecula Valley community deserves.

After the ravages of Covid-19 the Temecula Valley Symphony stands ready to embrace **A New Beginning**.

Background

The Temecula Valley Symphony (TVS)—initially chartered as the Inland Valley Symphony—began in the late 1990s as a group of volunteer orchestral players who came together to perform classical music. The early TVS grew over time, attracting players sufficient to the personnel requirements of 19th-century repertoire.

During its early years the orchestra attracted several volunteer conductors, but it became apparent to the leadership of the orchestra that organizational stability and artistic excellence required a paid conductor, one who could raise the quality of repertoire and performance while increasing the size of the audience.

The zenith of these early efforts came under the directorship of Anthony Parnter, who conducted the orchestra from 2008 to 2014. Audiences continued to grow and the orchestra performed regularly in the Old Town Temecula Community Theatre and Murietta Mesa High School Auditorium. Audiences ranged in size from about 400 to 600. The repertoire was “classical music,” that is, music written for the symphony orchestra in the 18th, 19th, and early 20th centuries, and “pops” music, ranging from light classics to film and commercial music.

In 2014 Parnter left the orchestra, and after a year’s search conducted by a committee comprised of orchestra members and board members, John Mario Di Costanzo was selected as the third professional conductor of the Temecula Valley Symphony. The John Mario years have been notable for growth in the proficiency of the orchestra and a growth in the orchestra’s relationship with the City of Temecula.

At the same time Alana Joos was hired by the orchestra to manage the organizational affairs of TVS, including performance venues, contracting of musicians (paid and volunteer), and printed programs for the audience.

While the quality of performance under John Mario has grown, TVS has not been as successful in growing a loyal audience of a size needed for the financial health

of the orchestra. Several strategies have been tried to increase audience size, including shifting to a more pops-oriented repertoire, featured cover performers (imitators of Frank Sinatra, Barbra Streisand, etc.) and elimination of multi-movement works (considered too long for the audience), such as symphonies and concertos.

Compounding the challenges of growing an audience was the outbreak of Covid-19 in 2019. TVS suspended concerts for that season. When the epidemic finally subsided TVS found itself without its regular performing venues, Murietta Mesa High School Auditorium and Temecula Valley High School Auditorium, which did not permit public audiences due to Covid concerns and social distancing problems.

TVS found a temporary performing home in Grace Presbyterian Church, which TVS had used previously for chamber music concerts. The hall/sanctuary is small, seating a bit over 400 at maximum. The acoustics are good but the stage situation is not really adequate for a full symphony orchestra. The audiences, however, have been enthusiastic and warmly accepting of TVS.

At the same time TVS was losing its audience to Covid, it was also losing players who did not want to breach social distancing to play in the orchestra. Generally speaking, TVS has lost the volunteer services of quite a few string players, leaving the orchestra sonically unbalanced for the type of repertoire it performs. Even so, the programs performed at Grace Church—both symphonic and chamber—have been enthusiastically appreciated by the audiences, receiving many lengthy standing ovations.

The challenges now facing TVS are:

- Growing the orchestra to its full potential
- Finding a permanent home for TVS
- Growing a loyal and generous audience
- Providing the leadership and management to achieve these goals. As TVS grows out of its Covid hibernation it is time for **A New Beginning**.



Temecula Valley Symphony 2016

TVS Outcome #1:

Provide the greater Temecula community with a first-rate symphony orchestra.

To achieve pre-eminence in the orchestral field TVS must grow into the size of ensemble that can most effectively perform large-scale symphonic music. Currently, TVS does not field a string section (first violins, second violins, violas, cellos, and basses) equal to the requirements of 19th- and 20th-century serious compositions, or equal to the requirements of most film music that comprises a great deal of the popular programming of TVS.

For a proper sound balance a string section must be able to compete equally with the combined winds, brass, and percussion. A 40-member string section of at least 10 first violins/10 second violins/8 violas/8 cellos/4 basses is advisable. This is the size orchestra that our models, the Pasadena and San Bernardino Symphonies use. Currently, TVS fields a string section of about 24 players, well under the minimum requirements of TVS's typical repertoire. To accomplish this growth the following strategic areas have been identified.

Year 1 Goals:

- Grow string sections
- Stabilize personnel
- Become AB5 compliant
- Contract season in advance
- Season—4 full concerts; 2 civic concerts (Memorial Day, Veterans Day); 2 chamber concerts
- Paid principals
- Dress rehearsal in concert venue
- Paid Librarian
- Acquire a permanent concert venue and rehearsal venue
- Day of Concert—1-hour maximum sound check; 1 hour break minimum; concert (no dress rehearsal before)
- Personnel—Winds, 3,2,3,2; Brass, 4,3,3,1; Perc., 3; Strings, 6,4,3,5,3. Total 45

Year 3 Goals:

- Paid principals; gas money for everyone else
- Season—5 full concerts; 3 civic concerts (Memorial Day, July 4, Vets Day); 3 chamber concerts
- Personnel— Winds, 3,2,3,2; Brass, 4,3,3,1; Perc., 3; Strings, 8,6,6,8,4; Total 56

Year 5 Goals:

- Union scale, full orchestra
- Personnel— Winds, 3,2,3,2; Brass, 4,3,3,1; Perc., 3; Strings, 10,10,8,8,5. Total 65

**TVS Outcome #2:
Grow, engage, and retain
a large, loyal audience.**

Great orchestras and great audiences go hand in hand. Audiences for TVS over the past several years have not reached the potential needed for either sufficient income (ticket sales) or concerts enjoyable to the orchestra membership (no orchestra wants to play to under-sized audiences).



Maestro John Mario

Several years ago, in response to what was felt to be concert audiences that were too small and not generating sufficient revenue, TVS programming became more pops oriented. Cogent arguments have been made in support of both serious and pops programming. What has become clear, however, is that TVS has no firm grasp of the nature of greater Temecula audiences. To attract more people to TVS concerts TVS needs to understand the greater Temecula community and then begin to design programs, repertoire, and marketing to keep our concert revenues optimal.

To accomplish these goals the first step is to get to comprehensively know the people of Temecula and their relationships toward orchestral music and its programming. The most effective way to gain this insight is through professionally designed and run Focus Groups. The first and most important strategic step towards audience building and retention is the Focus Group process.

The following steps are required, which should take place in Year 1 of the plan:

- Research and identify service providers
- Establish budget for Focus Group
- Seek foundation/corporate funding for Focus Group effort
- Implement changes suggested by Focus Group data

Additionally, TVS needs to grow its audience through advanced and thorough marketing, using the information generated by the focus group process. A marketing plan needs to be devised that will keep the TVS brand in front of Temecula audiences on a consistent basis, a plan whose results are measurable by *reach* and *frequency*. These steps should also be accomplished in Year 1.

- Establish and populate Marketing Committee of the Board
- Design marketing plan
- Submit budget for marketing
- Implement plan
- Review marketing data quarterly

Through Focus Groups and a comprehensive Marketing Plan, increased ticket sales—both single-concert and season tickets—can be raised to industry standards, roughly 40% of annual revenue.

Other enhancements of the concert-going experience should be considered, such as program notes on social media; video screens in the concert hall showing the conductor and orchestra from the orchestra's POV; and innovative seating, such as seats behind the orchestra. It is also recommended that orchestra members receive gratis complimentary tickets to each concert, thus helping to increase audience numbers. There is no better "buzz" about a concert than playing to a full house. The small loss of revenue is minor when compared to the positive public relations that capacity audiences encourage.

TVS Outcome #3:

Recruit and retain a dynamic board of directors, which can lead TVS and is capable of dynamic change.

To accomplish the goals of the Strategic Plan a Board of Directors must be recruited that will drive and manage the growth process. As the targets of the first several years are met, the Board will need to transition from work-oriented to governance-oriented responsibilities.

Year 1 Goals:

- The Chair of the Board serves as the change manager of the Strategic Plan
- Increase board membership to 10; full complement of 15 by Year 3 or earlier
- Create Board Book
- Institute comprehensive record keeping
- Adopt Roberts Rules of Order for meetings
- Immediate compliance with state and federal regulations regarding non-profits
- Establish Working Committees of the Board – Fundraising, Board Recruitment, Marketing, Audience Building, Youth Symphony
- Join Symphony Orchestra League
- Revise Bylaws, especially the definition of Member
- Consider term limits for Board members
- Require 100% of board members to be donors to TVS



Ruslan Biryukov, Artist in Residence

Year 3 Goals:

- Fully functioning Board Committees
- Board meets quarterly
- Full complement of 15 Board members, perhaps revise bylaws to enlarge board
- Set minimum annual donation, requirement of board membership
- Part-time Office Manager
- Part-time CEO
- Part-time Director of Development
- Acquire permanent office site
- Part-time IT manager
- Fundraising \$\$ annually

Year 5 Goals:

- Full-time CEO
- Full-time Director of Development
- Full-time Office Manager
- Fundraising \$\$ annually
- TVS established as Regional Orchestra
- TVYSO fully established
- Full orchestra season, plus run-outs

TVS Outcome #4:**Grow, retain, and steward donors sufficient to the transformation and success of TVS.**

All symphony orchestras rely on outside income in order to provide the product that the music-loving public desires. In Europe, concert orchestras receive significant support from local and national governments; in the US orchestras rely upon income from dedicated and generous donors. The ratio of earned income (ticket sales and other revenues) to contributed income is roughly one-to-one, 44% to 46%.

Currently TVS receives only sporadic institutional support and almost no individual support. To grow TVS into a regional orchestra an aggressive, comprehensive, and transformative fundraising culture must be implemented. Such an effort will require coordinated teamwork that involves the Board, Volunteers, and the Orchestra.

It costs about \$15,000 to provide one concert of the full TVS. Such concerts generate a little under \$5,000 in sales. This leaves a revenue shortfall of about \$10,000 per concert.¹ For the purposes of this plan it is assumed that this \$15,000 is the amount needed to be raised for an individual concert. The costs of hall rental and other ancillary expenditures are not factored in as TVS does not have a permanent home, thus there is no way to predict such costs. For chamber music concerts a cost of \$3,000 per concert is assumed.

For a Year 1 concert schedule of 4 full orchestra concerts (\$60,000) and 2 chamber concerts (\$6,000) a total of \$66,000 will need to be raised. For Years 3 and 4, which anticipate 5 full orchestra concerts and 3 chamber music concerts, \$102,750 each will need to be raised.

¹ For this plan the income generated from civic concerts will not be figured into this document, as the exact records of profit and loss are not available. These concerts are considered a revenue source.

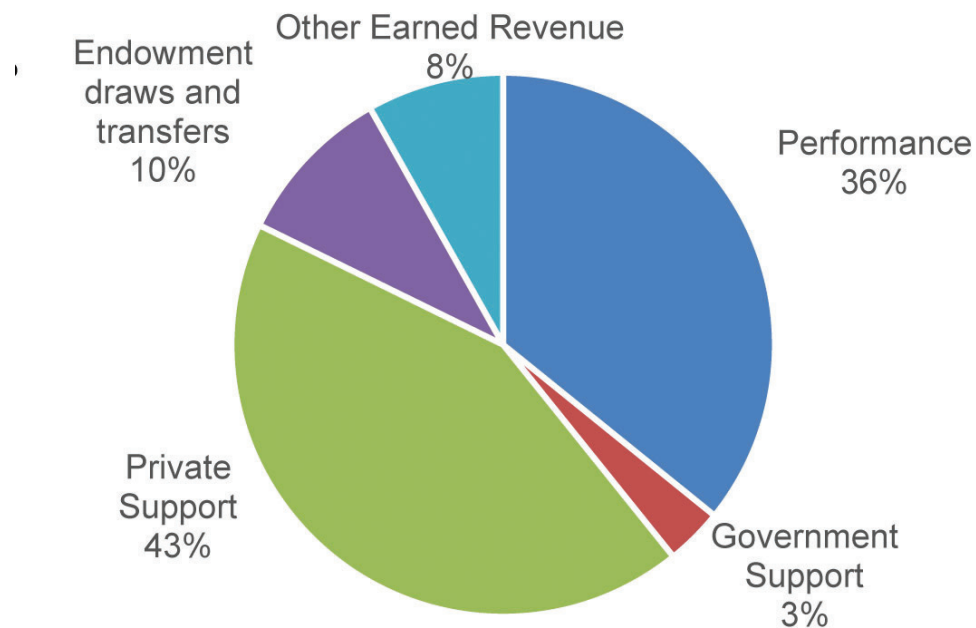
For Year 5 and beyond, assuming 5 full concerts and 3 chamber concerts, the figure of \$102,740 will suffice. If, however, TVS elects to make the transition to a union orchestra, costs will expand to \$229,820.

These numbers are realizable, given a robust philanthropic enterprise. If TVS is perceived as an artistic and economic asset to the greater Temecula community, such numbers are achievable through disciplined work, consistently applied.

TVS will need to undertake fundraising efforts in the following categories:

- Major individual gifts
- Corporate underwriting
- Foundation giving
- Annual fund
- Planned giving

Adult Orchestras' Revenues by Source



Source: League of American Orchestras, "Orchestras at a Glance," January 2020

To enhance the effectiveness of these efforts a dedicated stewardship effort (organized gratitude and recognition) also needs to be instituted.

TVS will need to hit the ground running to be able to attack its fundraising goals effectively. The following timeline is suggested to get the TVS fundraising effort established and operating.

September 2022

- Establish and populate committees
 - o Major Gifts
 - o Annual Fund
 - o Corporate Underwriting
 - o Grants
 - o Stewardship
 - o Special Events
- Board collects names and information
- Executive Director supplies lists of past and current donors

October 2022

- Commence Major Donor cultivation and solicitation
- Annual Fund
 - o Board decides direct mail or email
 - o Board decides budget for solicitation
 - o Decide on date for first Annual Fund solicitation (November or December 2022)
 - o Second solicitation April or May, including information on the 2023-24 season

November 2022

- Stewardship Committee establish protocols for recognition
- Institute timely response to donations—one week turnaround for receipts

Monthly progress reports will be needed initially to keep these efforts on schedule. After about a year, quarterly reports should suffice. Generally speaking, the Temecula Valley Youth Symphony will conduct its own fundraising, but will coordinate those efforts with the TVS Fundraising Committee so as to avoid confusion.

Fundraising is the key to the successful longevity of TVS and is the linchpin of this Strategic Plan. It should be noted that committees of the board do not need to be populated solely by board members. Non-board volunteers can be recruited, also, though Chairs of the various committees should probably be board members.

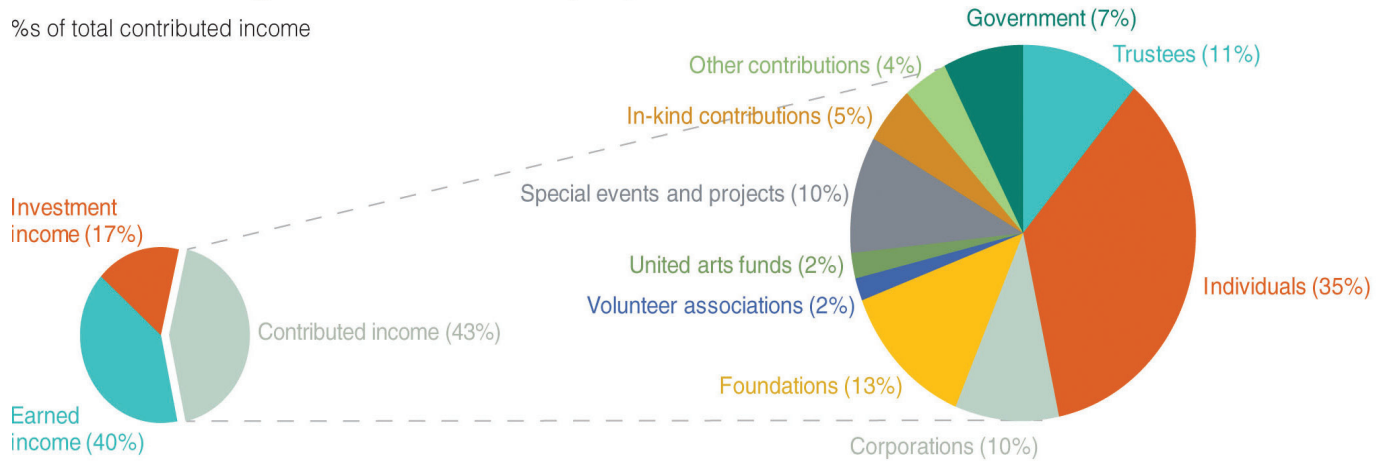
To give some idea of how a fundraising effort should be organized, the following giving diagram is provided. Such a diagram is useful in the organizing of a fundraising effort and demonstrates the level of activity needed to be successful.

Gift Range	# Gifts	# Prospects	Subtotal	Cumulative Total	Cumulative Percentage
10,000	2	8	20,000	20,000	28%
5,000	4	16	20,000	40,000	56%
1,000	10	40	10,000	50,000	70%
500	25	100	12,500	62,500	88%
100	50	200	5,000	67,500	95%
many small	-----	-----	2,500	70,000	100%

While no fundraising effort exactly mirrors such a giving chart, this will serve as a guideline for the first year's effort. One can see that, though the number of gifts is relatively small (~200), the number of prospects (364) is fairly large. The effort and effectiveness of the Fundraising Committee will play a crucial role in the success of this plan. Additionally, the entire board and volunteer structure must play an active part in the identification of potential donors.

Breakout of Average Contributed Income (2014)

%s of total contributed income



Source: League of American Orchestras, "Orchestra Facts: 2006-2014"

Suggested Short-Term Giving Strategies

Corporate Underwriting

- \$10,000 per full orchestra concert
- \$5,000 per chamber concert
- Benefits TBD

Individual Giving

- Conductor \$5,000
- Asst. Conductor \$3,000
- Concertmaster \$2,500
- Principal 2nd Violin \$1,000
- Principal Viola \$1,000
- Principal Cello \$1,000
- Principal Bass \$1,000
- Principal Flute \$1,000
- Principal Oboe \$1,000

- Principal Clarinet \$1,000
- Principal Bassoon \$1,000
- Principal Horn \$1,000
- Principal Trumpet \$1,000
- Principal Trombone \$1,000
- Tuba \$1,000
- Timpani \$1,000
- Librarian \$1,000
- **Total** **\$24,500**

Donor recognition in all programs, Honor Roll of Donors, press releases where appropriate, website, and social media.

Plan Calendar

	2022-2023	2023-2024	2024-2025
July			
		Annual review	Annual review
		Annual Fund solicitation #1	Annual Fund solicitation #1
August			
		Season program/Honor roll donors	Season program/Honor roll donors
September			
	Adopt Strategic Plan	Season kickoff gala	Season kickoff gala
	Appoint committee chairs		
	Fundraising		
	Major donors		
	Annual Fund		
	Gala		
	Golf tournament		
	Stewardship		
	Audience development		
	Board development		
	Marketing		
	Ad hoc committees		
	Bylaws		
	Records		
	Chairs recruit members		
	Assemble major donor database		
October			
	Committee reports	Quarterly review	Quarterly review
November			
	Committee reports	Committee reports	Committee reports
December			
	Committee reports		
	Annual Fund solicitation	Annual Fund solicitation #2	Annual Fund solicitation #2
January			
	Committee reports		
	Review Strategic Plan	Review Strategic Plan	Review Strategic Plan
	Quarterly review	Quarterly review	Quarterly review
February			
	TVYS Annual Fund solicitation	TVYS Annual Fund solicitation #1	TVYS Annual Fund solicitation #1
March			
	Committee reports		
April			
	Committee reports		
	Golf tournament	Golf tournament	Golf tournament
	Finalize next concert season	Finalize next concert season	Finalize next concert season
	Quarterly review	Quarterly review	Quarterly review
	Orchestra chair solicitation	Orchestra chair solicitation	Orchestra chair solicitation
May			
	Season ticket solicitation	Season ticket solicitation	Season ticket solicitation
June			
	Committee reports		
	Board retreat	Board retreat	Board retreat
	Review Strategic Plan	Review Strategic Plan	Review Strategic Plan

Conclusion

There is no one remedy that will solve the challenges that currently face the Temecula Valley Symphony. However, the steps detailed in the Strategic Plan— if consistently and diligently applied—should usher in a future of financial stability and artistic achievement of TVS. The orchestra will then take its place as the premiere cultural asset of the greater Temecula community. With the commitment of its board of directors, dedicated volunteers, generous financial supporters, and the orchestra itself, TVS stands ready to commence **A New Beginning.**

