



Great Lakes

Performing Artist Associates

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# Strategic Plan

2018-2022

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## Executive Summary

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The Board of Great Lakes Performing Artist Associates and its Executive Director prepared this Strategic plan as a road map to guide our work for the next three to five years. GLPAA, a not-for-profit arts management organization founded in 1978, occupies a unique position in a cultural environment that is rich with opportunities, but also highly competitive and filled with many challenges.

Having survived the recent economic recession and emerged to celebrate our 40<sup>th</sup> anniversary, we have created a document with our plans for the future. This Strategic Plan delineates our vision, our values, and the four major goals of our mission with the strategies we will use to fulfill them. It includes a statement of the roles and responsibilities of the Board and a comprehensive job description for the Executive Director. The plan presents a detailed picture of the current financial position of the organization and describes the ways the document will be used to secure our place as an important part of the arts landscape in the Great Lakes Region.

### **Organizational Description**

Great Lakes Performing Artist Associates, a non-profit organization founded in 1978, is composed of a salaried Executive Director and a volunteer board of teachers, musicians and community members dedicated to supporting performers and developing audiences in the Great Lakes Region. It was established to offer emerging musicians the technical skills necessary to build their careers, professional assistance in developing performance, outreach plans, and in creating promotional and marketing materials.

At the same time, GLPAA supports cultural and artistic development in the Great Lakes Region by acting as a booking agent for the artists on its roster. GLPAA offers high caliber artists at affordable fees to a group of diverse regional performing arts presenters such as small to intermediate sized performing halls, museums, colleges, churches, synagogues, schools, nursing homes and community centers.

In addition, GLPAA arranges musical performances and artist discussions in primary and secondary schools, many of which have a population that has never been exposed to live music recitals or had any interaction with

professional musicians. We call this our Caravan Program. The Caravan Program, which began in 2008, is an innovative and important part of the GLPAA organization. Musicians perform in school assemblies for the general student body, put on programs for students enrolled in choir, band and/or orchestra, give master classes, and work side-by-side with student musicians to provide individual, ensemble and sectional coaching. Artists' performances and outreach workshops are linked to school curricula so that music teachers and general studies teachers can incorporate the performances into the units they are teaching in the classroom or private studios.

### **Our Mission**

To develop artists and audiences for the live performing arts in Great Lakes Communities by creating performance opportunities and providing professional support and development for emerging and established musicians, and by utilizing our Caravan programs to present outreach concerts that will create future audiences and enrich young people's lives.

### **Our Vision**

To give artists the professional tools needed to showcase their talent and advance their careers in order to enrich communities, expose diverse audiences to a variety of musical experiences, and develop, support and encourage a culture that recognizes the value of music in our lives.

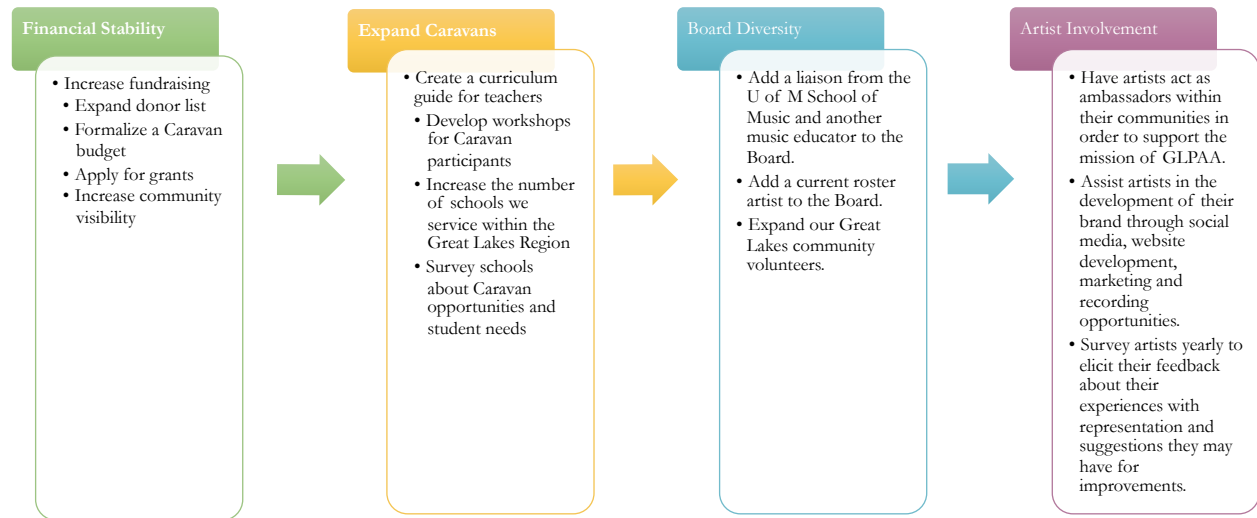
### **Our Values**

Music is an historic record of the people, events and values in our civilization.

Economic class should not determine whether one can have a musical concert experience.

Music is a valuable part of everyday life.

# Our Goals and Strategies



**Goal 1:** To be financially stable so that we can grow as an efficient organization that will serve our roster of performing artists and support our caravan programs.

## Strategies

- Increase fundraising.
- Expand donor list.
- Formalize a Caravan budget.
- Apply for grants.
- Increase community visibility.
- Develop financially feasible partnerships with presenters.

**Goal 2:** To expand and develop our Caravan program to connect with and support schools' and studios' core curricula and create a unique musical experience for all young people.

## Strategies

- Create curriculum guides for performers and teachers.
- Develop workshops for Caravan participants.
- Increase the number of students we service within the Great Lakes but especially Washtenaw County where we have direct contact with artists-in-residence and local presenter partnerships.

- Survey schools and community programs about Caravan opportunities and student needs.

**Goal 3:** To expand the diversity of our Board so that we become more visible to all populations within the community, and to create partnerships and form networks that will provide more performance opportunities for our artists.

**Strategies:**

- Add a liaison from the U of M School of Music and another music educator to the Board.
- Add a current roster artist to the Board.
- Expand our Great Lakes community volunteers.

**Goal 4:** To involve our artists in promoting the mission of GLPAA.

**Strategies:**

- Have artists act as ambassadors within their communities in order to support the mission of GLPAA.
- Assist artists in the development of their brand through social media, website development, marketing and recording opportunities.
- Survey artists yearly to elicit their feedback about their experiences with representation and suggestions they may have for improvements.

# Board Roles and Responsibilities

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## **Determine the Organization's Mission and Purpose**

Create a mission statement delineating the goals, strategies and purpose of the organization, and highlighting the constituents the GLPAA plans to serve.

## **Select the Executive Director**

Maintain a comprehensive job description for the Executive Director and communicate the duties, goals and objectives encompassed within it to all candidates. This description may be changed with the input of the Director as the organization grows and evolves.

## **Support the Executive Director and Review Performance**

The Board's Executive Committee and the Executive Director meet annually to review the Director's job description, make any changes deemed necessary, and determine whether the Director's job performance meets written expectations.

## **Ensure Effective Organizational Planning**

Meet at least twice a year to review GLPAA's status with regard to programs, services, membership, finances and staffing. If necessary, revisions may be made to GLPAA's goals, strategies and vision to better achieve its mission.

## **Ensure Adequate Resources**

Periodically review GLPAA's finances for sources of funding, and will determine whether or not that funding is adequate to meet our needs and fulfill our vision and purpose. Grants, individual and group donors and other sources of income will be identified. Fundraising strategies will be planned with specific methods for executing them. All Board members will be expected to give the organization an annual gift.

## **Manage Resources Effectively**

Develop the annual budget, taking into account all income sources, analyzing the previous year's financial report, and prioritizing the goals for the upcoming year. A financial philosophy should be agreed upon and a financial plan put into place.

### **Determine and Monitor GLPAA Programs and Services**

The Board and the Executive Director will decide together which programs and services to support. With limited resources and countless possibilities, these decisions will be made based on our mission statement and our vision for the future. Once made, key members of the Board will oversee their implementation and continuously review their success or failure, reporting to the entire board as needed. Monthly Agenda, Board Minutes and Executive Director reports will be documented and distributed in a timely manner noting the progress of each program and service performed, so decisions about whether or not to continue them can be made.

### **Enhance the Organization's Public Image**

Implement a public relations program, including press releases about upcoming programs, interviews with staff, board members and artists, social media links to events and calendars, and announcements about performances, notable achievements and special partnerships. Board members will make the organization known to civic groups by speaking and/or writing about the importance the work GLPAA does and describing its place in the arts community.

### **Recruit and Orient New Board Members and Assess Board Performance**

Board members have a responsibility to attend Board meetings, contribute to the work of the organization, propose and orient new members, and periodically and comprehensively evaluate their own performance based on the description of Board responsibilities above.



# Executive Director Position Description

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As the key operational and management leader of GLPAA, the Executive Director is responsible for overseeing and administering the strategic plan as well as fundraising, marketing, community outreach, daily operations and establishing and curating all key relationships. The position reports directly to the Board of Directors.

## **General Responsibilities**

**Board Governance:** Works with the Board in order to fulfill our mission.

Lead in a manner that supports and guides GLPAA's mission as defined by the Board of Directors.

Communicate effectively with the Board providing accurate and timely information necessary for the Board to function properly and make informed decisions.

**Financial Performance and Viability:** Identifies and assists in developing resources sufficient to ensure the financial health and future of the organization.

Ensures the fiscal integrity of GLPAA by submitting a proposed annual budget and monthly financial statements to the Board that accurately reflect the financial condition.

Implements sound fiscal management that generally anticipates operating within the approved budget, ensures maximum resource utilization, and maintains the organization in a positive financial position.

Identifies, recommends and implements fundraising and developing the resources necessary to support GLPAA's mission.

**Organization Mission and Strategy:** Works with Board and staff to ensure that the mission is fulfilled through programs, strategic planning and community outreach.

Implements GLPAA programs.

Enhances GLPAA's image by being active and visible in the community.

Plans and carries out strategies to implement the organization's goals.

**Organization Operations:** Oversees and implements appropriate resources to ensure that the organization moves forward efficiently and effectively.

Administers GLPAA operations.

As required, co-sign all agreements and contracts.

### **Reporting Structure and Evaluation Process**

Develops performance standards in conjunction with the Executive Committee.

Establishes, with the Board, a yearly, monthly, daily timetable of required duties and deadlines.

Collects and summarizes data relative to the performance of duties, to be reviewed at the annual review/evaluation meeting.

### **Professional Qualifications**

- Bachelor degree required, with strong emphasis in music and/or related performing arts
- Transparent and high integrity leadership qualities
- Five or more years non-profit management experience
- Budget management skills, including budget preparation, analysis, decision-making and reporting
- Strong organizational abilities including planning, delegating, program development and task facilitation
- Ability to convey a vision of GLPAA's future to board, volunteers and donors
- Knowledge of fundraising strategies and donor relations unique to nonprofit sector
- Skills to collaborate with and motivate board members and other volunteers
- Strong written and oral communication skills
- Ability to interface with and engage diverse volunteer and donor groups
- Strong public speaking ability

## Financial Summary

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Founded in 1978, GLPAA has struggled to create a firm and stable financial base. For many years our Executive Directors gave up substantial portions of their salary to help the organization, and the Board found it necessary to approve the liberal use of the \$25,000 bank line of credit. Following the 2008 economic downturn, we lost some long-time, significant funding sources, and several fundraising initiatives, such as the Michigan Council for the Arts and Cultural Affairs awards, Pfizer grants and the Celebration of Women fundraiser.

Between 2010 and 2013 GLPAA terminated all paid staff and depended on a volunteer Executive Director and office manager. Bookings fell to a \$40,000 annual level, but despite our loss of funding and low level of bookings, with no payroll to worry about our financial situation improved. By the end of fiscal year 2014, we had a surplus of approximately \$40,000 and were able to hire our current Executive Director.

### **Concert Bookings, Caravans and Top-Line Growth**

As can be seen in the attached detail for the nearly five years from 2013-14 to date, our top-line concert bookings for the four full years through 2016-17 have moved up from \$43,647 to \$69,565 (higher in 2015-16 at \$76,025), and to date in March, 2018 our FY 2017-18 bookings stand at \$93,300. Concerts booked for our next fiscal year, 2018-19, are already \$52,950 which is a level 45% higher than the comparable look-forward periods measured at March, 2016 and March, 2017. We believe this higher level of earlier booking in fact represents higher quality booking. Specifically we believe these bookings show longer-term Planning by venues resulting from recent marketing initiatives on social media and conference attendance.

Revenues from all sources, including our Caravan education initiative and special events, have increased from \$51,517 in FY 2013-14 to \$98,150 in the current year through March. Caravans during the same period have shown considerable variations during the respective five-year periods of \$7550; 600; 10,846; 9350 and 4850. As noted elsewhere in this Plan, we continue to develop creative shared-funding opportunities to present our artists in school settings and master-classes when our artists are performing in an area where a Caravan can be arranged, both logistically and financially. Top-line Caravan revenues should

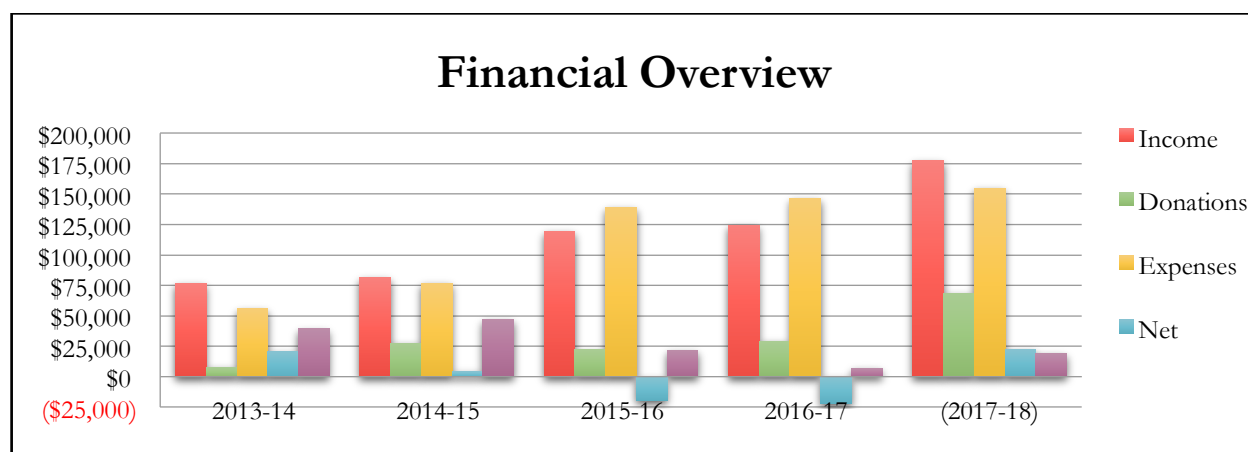
be evaluated against corresponding Caravan expenses when reading our financial reports.

## RECENT FINANCIAL HIGHLIGHTS AND DONATION HISTORY

Aside from our progress in bookings, other important aspects of our financial progress over the past five years are as follows:

	Income	Donations	Expenses	Net	Cash on Hand
2013-2014	76,532	7,850	55,859	20,672	39,299
2014-2015	81,111	27,310	76,878	4233	46,948
2015-2016	119,185	22,019	138,960	(19,175)	21,831
2016-2017	124,576	29,024	146,346	(21,770)	6,825
(2017-2018)	177,285	68,077	154,996	22,289	18,768

Note: Income includes Donations.



Donations in 2017-2018 (shown as a partial year through March, 2018) were approximately \$40,000 greater than previous years' averages due to our 40<sup>th</sup> year matching campaign. Removing this \$40,000 from the 2017-18 Income, Donations and Net amounts shown above, we estimate that our Net for 2017-2018 would be approximately (18,000) which is in line with the previous two years' experience.

The 40<sup>th</sup> Year Celebration 100% match by the Whitman Family Foundation runs through December, 2018. We expect that the approximately \$6000 remaining in this match will partially make up for the cessation of regular funding of approximately \$10,000 we have enjoyed in past years from the Whitman Foundation.

## **Board Initiatives For Growth**

This strategic plan has been developed to 1) formalize our corporate policy, 2) guide our efforts to enlist financial support for our activities, and 3) streamline our organizational procedures by redefining the job of Executive Director and by involving Board members more directly in financial management tasks.

With these changes in place, the Executive Director will have more time focus on mission and strategic plan driven duties including booking concerts and brand development for our artists, promoting and refining our Caravan Program, identifying and securing funding and partnership resources.

In the five fiscal years between 2013 and 2018 our current Executive Director has implemented substantial improvements in the GLPAA's office procedures. These past efforts resulted in and will continue to provide GLPAA with increased efficiency, effectiveness and visibility. In addition, the GLPAA website and all outdated artist websites were updated to adapt to modern usage. All artists were encouraged to utilize social media platforms (Facebook, Twitter, Instagram, YouTube, Spotify) for marketing purposes. Finally, we have recently implemented a social media-based fundraising platform as an aid to enlisting financial support from foundations, granting bodies and individual donors.

## **Near-Term and Future Budgeting Considerations**

We predict, assuming modest increases in booking levels and no large new expenses, an approximate deficit of \$20,000 in 2018-2019. We believe that we can cover this with our cash on hand without using our \$15,000 line of credit. Our most significant expense, aside from an 80% remittance to artists, is our Executive Director's salary, which does not include health care or other benefits other than statutory payroll taxes. This expense has dropped from approximately 50% of top-line revenues in fiscal year 2014-15 to approximately 40% for the current year through March, despite a substantial salary increase midway through fiscal year 2015-16 and an increase in hours from 20 to 30 per week. It is now in line with that of other executive directors for similar-sized non-profits and acts as recognition for the improvements our Executive Director has made to GLPAA's infrastructure, office procedures, website, social media tools and artist supports. As our organization and our budget evolve, the Board will continue to evaluate this expense and look for ways to more easily absorb it without going into debt. To break even for the 2019-20 period we must increase

bookings, donations, grants and other funding sources to cover our \$20,000 deficit. The Whitman Family Foundation matching \$40,000 grant has given us time to stabilize our financial status.

## **Financial Future**

The upcoming year is critical. We have served as an arts-based non-profit for four decades. We have made significant contributions to the music community that we serve. We have a strong Executive Director. Our bookings are up significantly, both absolutely and in quality, and much important development, infrastructure and marketing work has been done. Our challenge now is to become economically sustainable.

## **Summation and Communication**

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This strategic plan was created between April 2017 and April 2018 by Board members, volunteers and the Executive Director. Continuous monitoring, evaluating, change and update will be utilized to meet the needs of the artists and audiences served in the Great Lakes Region. The plan presents a picture of the organization at present and a vision for its future. It details specific goals and objectives that support its mission to help artists define and develop their careers, find performance venues in the Great Lakes Region, and present culturally rich programs to diverse audiences. The financial plan is to acquire enough resources from ticket sales, grants and donations to fully sustain its programs, including those that bring professional musicians into schools and community organizations to perform for and interact with students.

Now that the strategic plan is completed, GLPAA must share it with musical associations, funders, potential collaborators and local media, to raise the public profile and make communities more aware of the mission. The strategic plan will be used to showcase activities, aspirations and successes. Board members, volunteers and the Executive Director will focus on implementing the goals and strategies delineated in the plan and, as times and circumstances change, modify them as needed. This strategic plan will bring Great Lakes Performing Artist Associates together as an efficient and effective organization financially stable and uniquely innovative.

# Appendix-Supporting Financial Documents

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