

RED DEER SYMPHONY ORCHESTRA

# Strategic Plan 2022-2025

*Prepared with assistance from  
Finley & Associates Ltd.*

**Vision:** *Igniting passion for arts and  
culture in Central Alberta.*

**Mission:** *A community-oriented  
professional performing arts leader  
dedicated to engaging, educating, and  
inspiring Central Alberta through music.*

The development of this plan has been  
insightfully supported by:



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# One Page Summary

## Values

Values are fundamental principles and beliefs that serve as implicit criteria guiding all actions and decision-making.

- **Community Leadership** – Advocate for the arts in our community
- **Diversity** – Differences are what make us stronger
- **Creativity** – Think in new ways to solve problems and innovate
- **Resiliency** – Never give up and pivot as required
- **Collaborative** – Work with others to achieve greater things
- **Local** – Musicians and community rooted in Central Alberta

## RDSO Vision

The vision articulates the desired future state of the RDSO.

**Igniting passion for arts and culture in Central Alberta.**

## RDSO Mission

RDSO's mission articulates what is done everyday to achieve the vision.

**A community-oriented professional performing arts leader dedicated to engaging, educating, and inspiring Central Alberta through music.**

## Strategic Priorities

To focus the efforts, four strategic priorities were identified for action over the next 36 months

1. **Long-term planning for people**
2. **Grow Community Connection**
3. **Grow Musician talent pool within Central Alberta**

## Goals

Goals are ideal states to be achieved at some time in the future by the RDSO.

1. **Re-imagine the role of an orchestra in community building.**
2. **Collaborate, curate, and create classical musical experiences.**
3. **Foster career pathways for local professional musicians through community connection and mentorship.**
4. **Foster and inspire a vibrant arts and culture sector in Central Alberta.**
5. **Contribute to making Central Alberta a great place to live.**
6. **Deliver accessible and diverse performances, support music education, establish strategic partnerships, and build engagement throughout Central Alberta.**
7. **Be operationally sustainable (i.e., human, financial, and cultural).**

## Key Success Factors

Key Success Factors (KSFs) are traits that when properly maintained or managed significantly impact the organization's ability to achieve its vision.

- **Artistic Vision**
- **Community Engagement**
- **Community Leadership**
- **Organizational Networks**
- **Infrastructure**
- **Evidence-driven**
- **Local**

## Key Performance Indicators

Key Performance Indicators (KPIs) are measures used to gauge performance.

1. **Audience Engagement**
2. **Partner Engagement**
3. **Artistic Integrity**
4. **Board Effectiveness**
5. **Financial Metrics**
6. **Organizational Effectiveness**

FINLEY / ASSOCIATES

## Purpose of the Document

This Strategic Plan articulates the strategic direction and supporting activities for the Red Deer Symphony Orchestra (RDSO) for the three-year period (2022-2025).

### Confidentiality

This document is intended for the use of RDSO and may contain information that is privileged and/or confidential. Copying and the dissemination or distribution of this document, in whole or in part, is at the discretion of the Board and/or the ED/MD.

### Disclaimer

The information and data provided in this plan has been obtained or prepared from sources that are believed to be reliable and accurate; however, have not necessarily been independently verified. Therefore, any use of the information by the reader shall be at the sole risk and responsibility of the reader. The information and the facts upon which the information is based as well as the information itself may change at any time.

# 1. Situation Assessment

## Overview

RDSO has contributed to Red Deer’s vibrant arts community since its establishment in 1987. RDSO is the largest, fully professional symphony orchestra for a city the size of Red Deer in Alberta and has been artistically led by Claude Lapalme since 1990. RDSO is governed by a volunteer Board that has recently seen significant turnover. The new perspectives and energy of the incoming Directors will be an asset with sufficient governance and strategic support<sup>1</sup>.

## High-Level Vision

The RDSO’s long-term vision is to transition from being a “Presenting Orchestra” to a “Resident Orchestra” that serves Central Alberta. The organization will continue to be a community leader in developing and supporting arts & culture across Central Alberta. The RDSO will put an increased emphasis on developing local professional music talent while advocating for music’s role in community building and well-being. The vision is to develop its audiences, partnerships and core of musicians across Central Alberta.

## Key Accomplishments

The Board felt that progress since the last Strategic Plan was strong, and that the organization had accomplished many of its goals, including keeping the budget under control. The Board was proud of RDSO’s successful advocacy with the City of Red Deer, as well as the regular usage of Key Performance Indicators (KPIs) to monitor performance. As with other arts organizations, the RDSO was severely impacted by the pandemic. Significantly, the Board felt that the roadmap created in the years leading up to COVID-19 enabled the organization to survive.

Key accomplishments cited include<sup>2</sup>:

### Programming

- ✓ Competitive with larger cities – audiences have enjoyed RDSO performances as much as ESO (Edmonton) or CPO (Calgary)
- ✓ Continued to sell out shows
- ✓ Developed online programming throughout the pandemic
- ✓ Performed accessible community outreach concerts in Red Deer.
- ✓ Performed diverse programming that appealed to the community.
- ✓ Partnerships with schools (i.e. Choir Kids) and with the Red Deer Public Library
- ✓ Phenomenal musicians and guest artists

### Governance

- ✓ Hiring and successful transition to a new Executive Director and Assistant
- ✓ Successful transition of the Board Chair position

### Profile

- ✓ New and attractive branding
- ✓ Performed at the Canada Winter Games (largest audience yet)

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<sup>1</sup> RDSO Work Plan 2021.

<sup>2</sup> RDSO diagnostic interviews December 2021; RDSO Board Strategic Planning, Session #2 February 10, 2022.

## Financial

- ✓ Built a reserve
- ✓ Budget in good shape!
- ✓ Significant grants have been a bonus
- ✓ More financially and organizationally stable

## Market Trends

Several market trends are directly or indirectly impacting the RDSO<sup>3</sup>:

### COVID-19 Pandemic

The COVID-19 pandemic is an ongoing global pandemic caused by a severe acute respiratory syndrome. First identified from an outbreak in the Chinese city of Wuhan in December 2019, the World Health Organization (WHO) declared a Public Health Emergency of International Concern on January 30, 2020, and a “pandemic” on March 11, 2020. The social and economic repercussions of COVID-19 have been felt across the world and have particularly crippled sectors like the performing arts.

Arts organizations have scrambled to survive the last 24 months, many approaching the pandemic with either a ‘wait and see’ approach, or a strategy of pivoting quickly to continue to engage with audiences. In addition, the Canadian Government took immediate and significant action to support Canadian businesses during the pandemic, supporting organizations like the RDSO with economic relief.

A rise in technology has enabled many world-class orchestras to become very accessible through digital programming, causing other orchestras to recognize these new competitors. Additionally, increasing production costs and supply chain issues continue to cause issues for the economy.

Apart from the long-term health implications, the pandemic has exacerbated societal divisions which have made it increasingly difficult for organizations to appease the community.

### Alberta Economy

Heavily devastated by COVID-19 and low energy prices, the Albertan economy is finally turning a corner. Alberta’s economic rebound is poised to continue in 2022, as stronger demand and higher commodity prices bolstered the Alberta energy sector in 2021.<sup>4</sup> RBC Thought Leadership released its “Provincial Outlook” in March 2022 and recognized that Alberta is on “the path to exit a period of highly abnormal conditions” as restrictions ease and the economy begins to recover. However, “patterns of consumption, savings and investment have changed in fundamental ways” and inflation at a three-decade high continue to pose challenges.<sup>5</sup>

Russia’s most recent invasion of Ukraine has “added a new layer of uncertainty on the global outlook amid soaring commodity prices”. Nevertheless, RBC anticipates that all provincial economies will continue to grow in 2022. Alberta’s growth in 2022 is expected to be +5.8% due to recovering energy and agricultural sectors.

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<sup>3</sup> RDSO diagnostic interviews December 2021.

<sup>4</sup> RBC Thought Leadership – March 2022 Alberta Provincial Outlook

<sup>5</sup> RBC Thought Leadership – March 2022 Alberta Provincial Outlook

## Red Deer

Located in Central Alberta, Red Deer is still viewed as a transient city with a limited arts & culture scene. The organization recognizes that its patron demographics are changing and that the ability to appeal to new audiences and perform diversified programming is paramount. This provides the opportunity for the RDSO to cement itself as the leader in developing the arts & culture scene with the potential to solidify support in the city and surrounding communities. Advocacy will continue to be a priority.

## Competitive Landscape

The pandemic has accelerated the progression of trends in all sectors, including the music industry, by approximately 10 years. Performing arts organizations across Canada pivoted in several ways including<sup>6</sup>:

- Releasing digital programming (often featured in unique venues)
- Offering a hybrid of in-person (limited access and socially distanced) and online programming
- Strengthening relationships with local Tourism Associations
- Offering unique outdoor and socially distanced experiences (e.g., campfire with s'mores, gourmet brie, and music; or building outdoor amphitheaters).

Several key comparators for the RDSO were evaluated for innovations and insights (see [Table 1](#)).

**Table 1: Key Comparators**

Organization	Characteristics/ Commentary
Calgary Philharmonic Orchestra	<ul style="list-style-type: none"><li>• Located in Calgary</li><li>• Pillar of community since 1955</li><li>• Perform in Jack Singer</li><li>• Diverse repertoire</li><li>• Focus on diversity and new composers programming</li><li>• PhilKids outreach program</li></ul>
Edmonton Symphony Orchestra	<ul style="list-style-type: none"><li>• Located in Edmonton</li><li>• Founded in 1920</li><li>• Perform in Winspear Centre</li><li>• 56 musicians</li><li>• Repertoire from great classical masterworks to pops and children's concerts</li><li>• Annual "Symphony Under the Sky" festival</li><li>• Young Composers Project</li><li>• Youth Orchestra of Northern Alberta</li><li>• 1996 – first orchestra in Canada to play on a First Nations reserve.</li></ul>
Vancouver Island Symphony	<ul style="list-style-type: none"><li>• "Symphony from Your Sofa" digital streaming series during the pandemic</li><li>• Pop-up concerts throughout the community in socially distanced and unique settings</li></ul>
Georgian Bay Symphony	<ul style="list-style-type: none"><li>• Focus on community partnerships and featuring local companies (e.g., wine shops)</li><li>• Digital programming during the pandemic</li></ul>
Westben Arts Festival Theatre	<ul style="list-style-type: none"><li>• Unique venue (barn) located in countryside</li><li>• Moved their residency program online; enabling them to reach an even wider audience across the world</li><li>• Digital concerts</li><li>• Strengthened relationship with local tourism associations</li></ul>

<sup>6</sup> Finley Team Analysis.



Organization	Characteristics/ Commentary
	<ul style="list-style-type: none"> <li>Offers unique experiences (e.g., campfire sing-a-longs; outdoor Amphitheatre)</li> </ul>

Interestingly, non-orchestral competitors were also identified for the RDSO to monitor. These competitors included activities that may pull people away from live orchestral music, including but not limited to: other performing arts in Red Deer, Edmonton and Calgary (e.g., Ballet; Opera; musicals); Netflix; sporting events; digital streaming from other orchestras globally (e.g., Berlin Philharmonic); and, YouTube.

### Areas of Growth

The RDSO has experienced growth and decline over the past several years (see [Table 2](#)).<sup>7</sup> Most notably, the organization’s revenue from grants has increased from \$125,465 in 2016-17 to \$208,006 in 2018-19. However, the total revenue from ticket sales decreased over \$16,000 between the 2016-17 and 2018-19 season. Furthermore, the number of members has steadily decreased over the last decade by 183 members.

**Table 2: RDSO Growth & Decline 2008 v. 2019**

Areas of Growth	2008-09*	2016-17	2018-19 <sup>8</sup>
Annual Budget	556,530	560,130	482,650
# of Members	454	299	271
Revenue from Ticket Sales	\$129,050	\$156,960	\$140,632
Grants	\$127,760	\$125,465	\$208,006
Fundraised Dollars	\$106,400	\$53,738	\$41,616
# of Concerts	6+1** <sup>9</sup>	7	7

<sup>7</sup> RDSO Strategic Planning Session #1, Jan 20, 2022

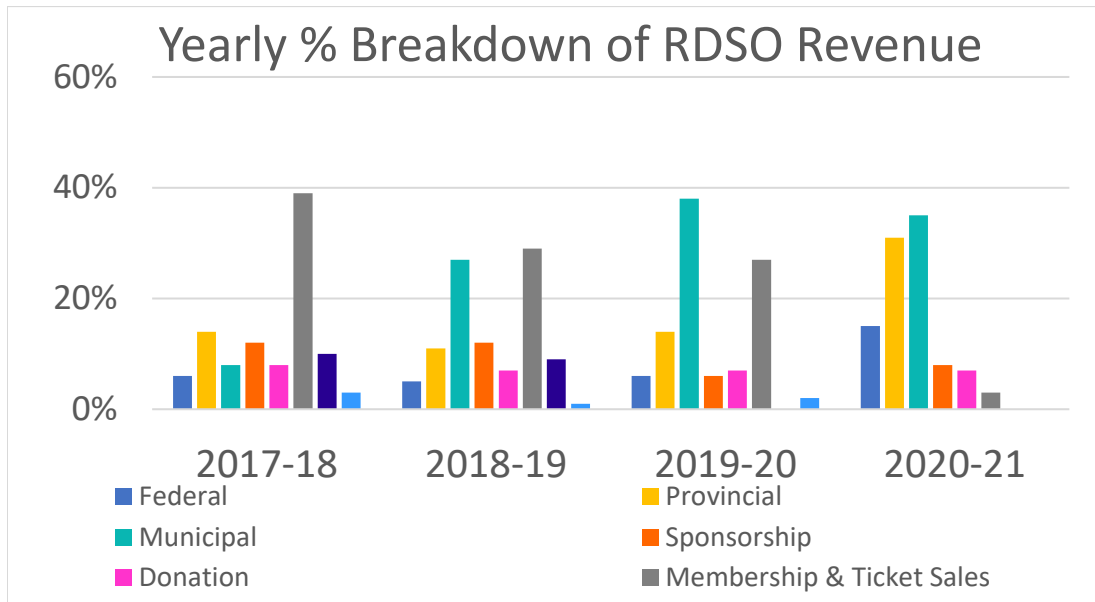
<sup>8</sup> 2018-19 was deliberately chosen as the last season of data to show due to the unusual numbers produced during the pandemic. As the world returns to normal, it was decided that data from 20-21 was not as relevant for the Board to consider when discussing the long-term vision of the organization.

<sup>9</sup> \*\*2008-09 & 2009-10 were some of RDSO’s most successful years in terms of ticket sales and financial success. Following 2011 RDSO saw a decline in grant and ticket revenue and following a failed fundraising event in 2013-14 was in deficit status; \*\*6 Main Series concerts + 1 Christmas Pops concert.

## Revenue

When comparing the RDSO’s Yearly % Revenue Breakdown<sup>10</sup> over the past four years (see *Figure 1*), the RDSO’s revenue has shifted from an emphasis on “Membership & Tickets Sales” in 2017-18 to being heavily reliant on grants in 2020-21. This is to be expected as the RDSO continues to recover from the economic impact of the pandemic.

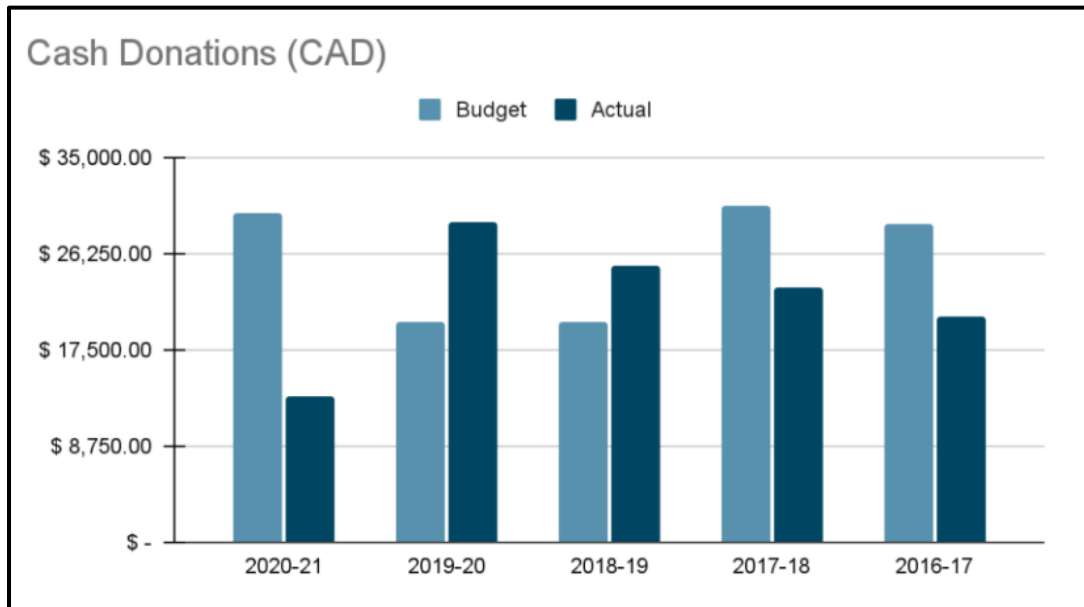
**Figure 1: Yearly % Breakdown of RDSO Revenue**



<sup>10</sup> RDSO Strategic Planning Session #1, Jan 20, 2022.  
 Red Deer Symphony Orchestra – Strategic Plan 2022-2025  
 Finley & Associates Ltd. (22-03-18)

In 2020-21, cash donations totaled \$13,333, which was significantly under the budget of \$30,000 (see [Figure 2](#)), which was anticipated due to the pandemic causing a drop in donations across the sector.

**Figure 2: RDSO Cash Donations**



## Central Alberta Focus

Traditionally, the RDSO’s performances have been concentrated in Red Deer. The refreshed strategy proposes a boundary for “Central Alberta” that encompasses the counties of Wetaskiwin, Camrose, Flagstaff, Wainwright, Clearwater, Ponoka, Provost, Red Deer, Stettler, Paintearth, Mountain View, Kneehill, Lacombe, Starland, Special Area 4, Special Area 3, Special Area 2; and, ‘Signature Venues’, which are key locations where the RDSO may perform (see [Figure 3](#))<sup>11</sup>. The strategy is to expand the reach of the RDSO into new communities within this boundary through new partnerships, collaborations, education, and other forms of outreach.

Within this boundary, the following festivals were identified as potential partnership opportunities to better connect with teachers, students and communities pre-disposed to classical music.

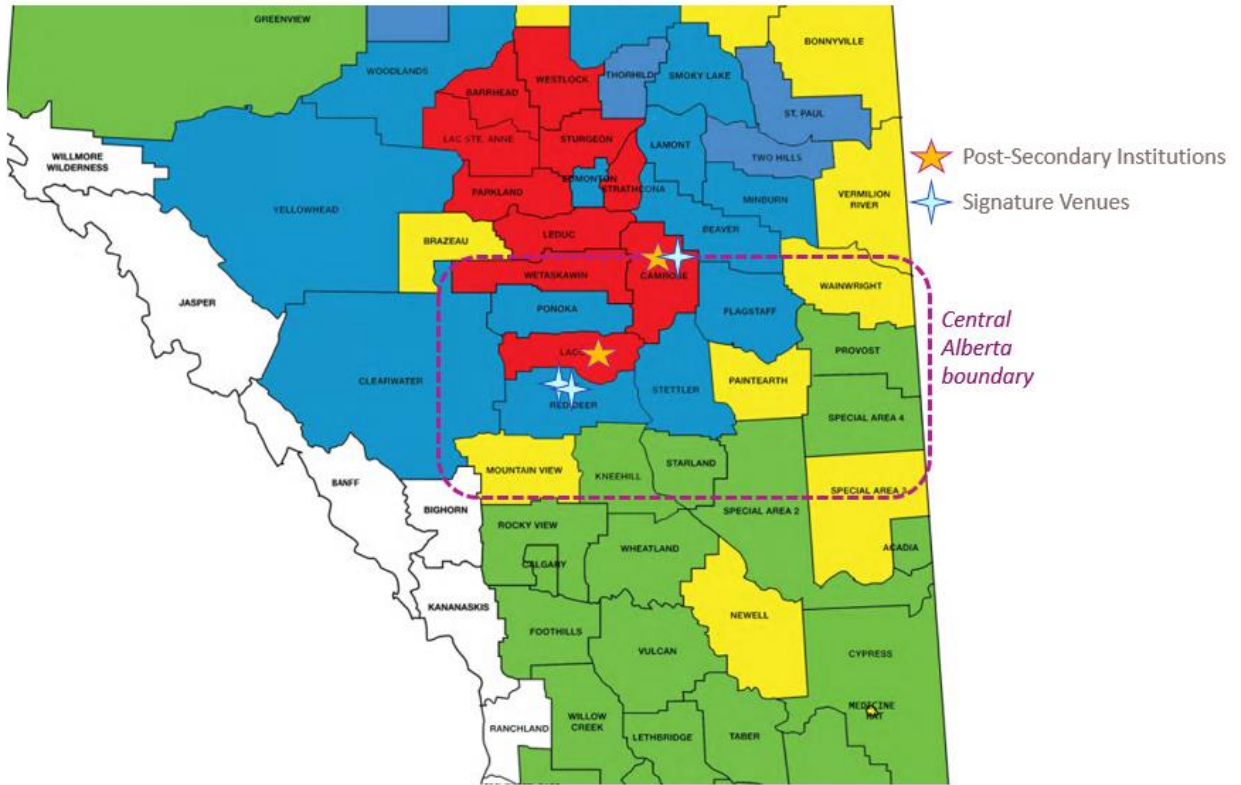
### Festivals in Alberta

- Camrose & District Music Festival
- Coronation Music Festival
- Drayton Valley Performing Arts Festival
- Drumheller Performing Arts Festival
- Lacombe and District Performing Arts Festival
- Olds & District Kiwanis Music Festival
- Provost Music Festival Association
- Red Deer Festival of the Performing Arts
- Stettler & District Music Festival
- Strathmore Performing Arts Festival
- Wetaskiwin Music Festival

<sup>11</sup> RDSO Strategic Planning Session #3, Feb 24, 2022.  
Red Deer Symphony Orchestra – Strategic Plan 2022-2025  
Finley & Associates Ltd. (22-03-18)

- Vermilion and District Music Festival

Figure 3: Central Alberta Boundary



## Implications of Repositioning

To shift the RDSO to a more Central Alberta focus as a resident orchestra, the following changes will alter fundamental parts of the organization<sup>12</sup> (see *Figure 4*).

**Figure 4: Today vs. Desired Future State**

Today	Desired Future State
<p><b><u>High-level Strategy</u></b></p> <ul style="list-style-type: none"> <li>• 30 Core Musicians</li> <li>• Rehearsals are in Calgary</li> <li>• Focus on quality vs. community connection or career growth</li> <li>• “Presenting Orchestra”</li> <li>• “Professional Orchestra”</li> </ul>	<p><b><u>High-level Strategy</u></b></p> <ul style="list-style-type: none"> <li>• 35 Core Musicians</li> <li>• Rehearsals are in Red Deer</li> <li>• Focus on community connection</li> <li>• Growing local professional talent</li> <li>• “Professional Orchestra”</li> <li>• Nurture local love of orchestral music (e.g., local composers)</li> </ul>
<p><b><u>Musician Location</u></b></p> <p>19 – Calgary            2 – Edmonton            1 – Red Deer            2 – Banff            1 – Innisfail            1 – Leduc            1 – Lacombe</p>	<p><b><u>Musician Location</u></b></p> <ul style="list-style-type: none"> <li>• More Core Players from Central Alberta augmented by Calgary/Edmonton for major works</li> </ul>
<p><b><u>Board Location</u></b></p> <p>2 Camrose            2 Lacombe            4 Red Deer</p>	<p><b><u>Board Location</u></b></p> <p>Central Alberta</p>

## Key Strengths

Several key strengths were identified<sup>13</sup>:

### Governance

- President & Executive Director
- Number of Board Members
- Dedicated and enthusiastic staff
- Transition of new Executive Director
- Resiliency of the group; keep re-inventing
- Light on our feet; nimble

### Product

- Musicians who enjoy playing together (few labour issues)
- Thirty-year history
- Music Director is skilled, well known, networked
- Diversified repertoire that appealed to diverse groups in the community (e.g., local/Canadian composers; LGBTQ+)

<sup>12</sup> RDSO Strategic Planning Session #3, Feb 24, 2022.

<sup>13</sup> RDSO Strategic Planning Session #1, Jan 20, 2022

### Outreach

- Core audience of major supporters
- Service to the community

### People

- Volunteers

## Areas for Improvement

Several areas for improvement were identified<sup>14</sup>:

### Governance

- Succession plans are needed throughout the organization (Music Director/ Board/ Committees)
- Streamline communication consistently across the organization
- Consolidate procedures and avoid inefficiencies and risks of perceived conflict-of-interest
- Enhance Board ambassadorship/ organizational-specific knowledge

### Product

- More focus on artists and talent from within the region.
- More diversified programming, collaboration with other groups, and increased outreach

### Sustainability

- Securing regular performance space (RDP Arts Center is often not available for concerts)

### Outreach

- Appeal to a wider range of demographics and audiences
- Advocacy on multiple levels
- Post-secondary connections

## Opportunities

Several opportunities were identified<sup>15</sup>:

### Governance

- New Board

### Product

- Ability to completely redesign things (e.g., number of concerts; size of the concerts; new venues; new experiences)
- Not tied to an image of what an Orchestra should look like; open to try something new
- Variety of programming

### Sustainability

- New Performance Space

### Outreach

- Work in collaboration with other arts groups in the community
- Advocate for the arts

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<sup>14</sup> RDSO Strategic Planning Session #1, Jan 20, 2022.

<sup>15</sup> RDSO Strategic Planning Session #3, Feb 24, 2022.

## Risks

Several risks were identified and then prioritized based on “High”, “Medium”, and “Low” impact to the RDSO (see **Table 3**).<sup>16</sup> The top four risks (tied for first place) were “Succession Planning for the Music Director as well as the Board & Committees” (particularly for the Board Chair position); and, (tied for second place) “Lack of dedicated Performance Venue” and “Succession Planning for Staff”.

**Table 3: Risks**

Risks	High	Medium	Low
1. Succession Planning – Music Director	6*	1	-
1. Succession Planning – Board & Committees	6	1	-
3. Lack of dedicated Performance Venue	4	3	-
3. Succession Planning – Staff	4	3	-
5. Diversified Revenue Sources	4	2	1
6. Strained Resources	3	4	-
7. Pandemic Recovery	3	2	2
8. Local Community Connection	2	5	-
8. Becoming “out of fashion” and losing market share	2	5	-
10. Rising Production Costs	1	5	1
11. Technology Adoption	1	1	5
12. Strategic Partnerships	-	5	2

<sup>16</sup> RDSO Strategic Planning Session #3, Feb 24, 2022.  
Red Deer Symphony Orchestra – Strategic Plan 2022-2025  
Finley & Associates Ltd. (22-03-18)

## Distinctive Attributes

Several Distinctive Attributes were identified and ranked based on ‘Today (2022)’ and ‘Aspirational (2025)’ (see **Table 4**). There were originally five Distinctive Attributes; however, two were eliminated (“Diverse and Engaging Programming” and “Organizational Culture”) as these two Attributes were not believed to be unique enough.<sup>17</sup>

**Table 4: Distinctive Attributes<sup>18</sup>**

RDSO's Distinctive Attributes	Today (2022)	Aspirational (2025)	2025
1. Arts Leader in Central Alberta	1 2 3 4 5	1 2 3 4 5	4.9
2. Professional and Experienced Musicians	1 2 3 4 5	1 2 3 4 5	4.6
3. Advocate for Music's Role in Community Building	1 2 3 4 5	1 2 3 4 5	4.4

### Scoring Criteria

- 1 – Insignificant efforts made toward goal
- 2 – Early progress has been made
- 3 – Achievements acknowledged by outside parties with some coaxing
- 4 – Awareness of achievements within sector groups
- 5 – Part of RDSO's public image/ brand

## Strategic Priorities

The RDSO identified three Strategic Priorities to drive focused action over the next 2-3 years.<sup>19</sup>

1. **Long-term planning for people**
  - Succession planning for all levels of the organization
  - Capacity building
  - Infrastructure support
2. **Grow Community Connections**
  - Re-orient the RDSO to reach a broader community
  - Identify and prioritize strategic partnerships (including the development of member and donor strategies)
  - Diversify programming to target core and growth audience segments (and identify Signature Venues)
  - Expand the Education Outreach Strategy
3. **Develop musician talent pool within Central Alberta**
  - Identify and prioritize strategic partnerships
  - Proactively recruit ‘local’ musicians from Central Alberta (i.e., within 80 km radius of Red Deer)

Action plans to address each of these priorities are outlined in Chapter 4: 3-year Implementation Plans.

<sup>17</sup> RDSO Strategic Planning Session #3, Feb 24, 2022.

<sup>18</sup> RDSO Strategic Planning Session #3, Feb 24, 2022.

<sup>19</sup> RDSO Board Strategic Planning, Session #4 March 10, 2022.



## 2. Strategic Direction

### Values

Values are fundamental principles and beliefs that serve as implicit criteria guiding all actions and decision-making<sup>20</sup>.

#### RDSO's Values

- **Community Leadership** – *Advocate for the arts in our community*
- **Diversity** – *Differences are what make us stronger*
- **Creativity** – *Think in new ways to solve problems and innovate*
- **Resiliency** – *Never give up and pivot as required*
- **Collaborative** – *Work with others to achieve greater things*
- **Local** – *Musicians and community rooted in Central Alberta*

### Vision

The vision states the desired future state of the organization<sup>21</sup>.

#### RDSO's Vision

***Igniting passion for arts and culture in Central Alberta.***

#### **Key Concepts:**

- “Let go of the ordinary.”
- Ignite passion for arts and culture in Central Alberta
- Leader in community building through music in Central Alberta
- Help to facilitate the growth of performing arts in Central Alberta

#### **Implications:**

##### ***Strategic Partnerships for local musician recruitment:***

- Festivals
- Post-secondary education institutions with music performance programs
- Alberta Registered Music Teachers Association

##### ***Signature Venues:***

- Red Deer Polytechnic Arts Centre (Red Deer)
- Loughheed Centre (Camrose)
- Gaetz United Church (Red Deer)
- A Barn? Or other outside-the-box idea?

##### ***Community Programming (venues)***

- School outreach
- Public Libraries (Red Deer, Camrose, and other smaller centres like Rimbey)
- Concerts in Care (Health Arts Society of Alberta)
- Town of Sylvan Lake, City of Camrose, City of Red Deer (outdoor concerts in community spaces)
- Venture into eastern counties of Central Alberta

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<sup>20</sup> RDSO Board Strategic Planning, Session #4 March 10, 2022.

<sup>21</sup> Ibid.

## Mission

The mission describes the organization's distinctive identity in the sector<sup>22</sup>.

### RDSO's Mission

*A community-oriented professional performing arts leader dedicated to engaging, educating, and inspiring Central Alberta through music.*

### Key Concepts:

- Embedded in the community
- Largest professional performing arts organization in Central Alberta
- Positioned to leverage arts organizations
- Outreach
- Educational experiences

## Goals

Goals are ideal states to be achieved at sometime in the future<sup>23</sup>.

### RDSO's Goals

1. Re-imagine the role of an orchestra in community building.
2. Collaborate, curate, and create classical musical experiences.
3. Foster career pathways for local professional musicians through community connection and mentorship.
4. Foster and inspire a vibrant arts and culture sector in Central Alberta.
5. Contribute to making Central Alberta a great place to live.
6. Deliver accessible and diverse performances, support music education, establish strategic partnerships, and build engagement through Central Alberta.
7. Be operationally sustainable (i.e., human, financial, and cultural).

## Key Success Factors

Key Success Factors (KSFs) are conditions that when properly maintained or managed significantly impact the organization's ability to achieve its vision<sup>24</sup>.

### RDSO's Key Success Factors

- **Artistic Vision**
- **Community Engagement**
- **Community Leadership**
- **Organizational Networks**
- **Infrastructure**
- **Evidence-driven**
- **Local**

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<sup>22</sup> RDSO Board Strategic Planning, Session #4 March 10, 2022.

<sup>23</sup> Ibid.

<sup>24</sup> Ibid.

## Key Performance Indicators

Key Performance Indicators (KPIs) are measured used to gauge performance against the Goals and Key Success Factors (see [Table 5](#)).<sup>25</sup>

### RDSO's Key Performance Indicators

**Table 5: Key Performance Indicators**

KPIs	Rationale for Measuring (link to Strategic Priority)	Measurement Mechanisms	Discussion Frequency	Board Committee
1. Audience Engagement	Develop a local community of orchestral music lovers.	Audience retention	Annual	Community Connection (Artistic Vision)
		Audience % mix	Annual	
		Audience Growth (absolute #)	Annual	
		# of community-based performances in Signature Venues	Annual	
2. Partner Engagement	Collaborate with local sector partners to extend and leverage resources.	# of strategic partnerships with local festivals and other arts organizations	Annual	Community Connection (Artistic Vision)
		# of core musicians from Central Alberta	Annual	
3. Artistic Integrity	Position RDSO uniquely in the marketplace.	Musician feedback	Annual	Community Connection (Artistic Vision)
		3-5 year Artistic Vision articulated	Annual	
4. Board Effectiveness	Strengthen good governance practices.	Board Assessment	Annual	Artistic Vision (Orchestra)
		2-year Board Development Plan	Bi-Annual	
		Policies up-to-date	Annual	
5. Financial Metrics	Ensure sustainability.	Cash flow	Annual	Finance & Fund Development
		% mix in ticket sales (single vs. subscription)	Annual	
		Donations (growth, absolute number and average donation)	Annual	
		Revenue diversification (target 8% Earned Revenue)	Annual	
		Budget variance	Annual	
6. Organizational Effectiveness	Ensure sustainability.	Succession plans in place for key leadership roles	Annual	Leadership & Organizational Culture
		# of volunteers	Annual	

<sup>25</sup> RDSO Board Strategic Planning, Session #4 March 10, 2022.

### 3. 3-year Implementation Plans

**Table 6: Strategic Priority #1: Long-term planning for people**

Strategic Priority #1: Long-term planning for people	Champion	Target Date
<b>1.1 Building leadership capacity within RDSO.</b>		
a) Develop a Board Recruitment Strategy, including updating the Skills Matrix.	Leadership & Organizational Culture (Community Connection)	Year 1
b) Develop a Board Chair Recruitment Plan.	Leadership & Organizational Culture	Year 1
c) Develop a Committee Member Recruitment Strategy.	Leadership & Organizational Culture (Community Connection)	Year 1
d) Introduce a Board Evaluation and develop a 2-year Action Plan to address performance gaps.	Leadership & Organizational Culture	Year 2/3
<b>1.2 Develop a Succession Plan for the Music Director and Executive Director.</b>		
a) Short-term illness.	Leadership & Organizational Culture	Year 1/2
b) Long-term illness.	Leadership & Organizational Culture	Year 1/2
c) Planned retirement.	Leadership & Organizational Culture	Year 1/2
d) Untimely departure.	Leadership & Organizational Culture	Year 1/2
<b>1.3 Continue to strengthen the capacity and infrastructure of the organization.</b>		
a) Develop high-level action plans for Board Committees.	Leadership & Organizational Culture	Year 1
b) Diversify revenue mix.	Finance & Fund Development	Year 1/2

**Table 7: Strategic Priority #2: Grow Community Connection**

<b>Strategic Priority #2: Grow Community Connection</b>	<b>Champion</b>	<b>Target Date</b>
<b>2.1 Re-orient the RDSO to reach a broader community.</b>		
a) Undertake further analysis of Comparators and Competitors.	Community Connection	Year 1/2
b) Develop a Segmentation Hypothesis of current and potential audiences.	Community Connection	Year 2
c) Conduct market research to identify who RDSO is attracting and <u>not</u> attracting but could.	Community Connection	Year 2
d) Develop a strategy to draw people in from YYC and YEG.	Community Connection	Year 2/3
e) Explore ways to rebrand that would allow RDSO to better reflect its desired position in Central Alberta.	Community Connection	Year 2/3
<b>2.2 Identify and prioritize strategic partnerships that grow financial support for the RDSO.</b>		
a) Develop a Membership Strategy.	Community Connection	Year 1
b) Develop a Donor/Sponsorship Strategy.	Finance & Fund Development	Year 1
c) Develop a Volunteer Management Strategy.	Community Connection	Year 2
<b>2.3 Diversify programming to target core and growth audience segments.</b>		
a) Rethink timing / length of season.	Artistic Vision	Year 2
b) Develop a Signature Venue programming strategy (e.g., Red Deer Polytechnic Arts Centre – Red Deer; Loughheed Centre – Camrose; Gaetz Memorial United Church – Red Deer).	Artistic Vision	Year 1
c) Explore unique venue opportunities for the RDSO.	Artistic Vision	Year 1
<b>2.4 Develop an Education Outreach Strategy.</b>		
a) Within schools.	Community Connection	Year 1
b) Within new communities in Central Alberta (e.g., Paintearth).	Community Connection	Year 2/3
<b>2.5 Prepare an Economic Impact Study/benefits that the RDSO can demonstrate to the City of Red Deer and other Counties.</b>	Finance & Fund Development	Year 1
a) Advocate for the importance of the RDSO to the Central Alberta community.	Community Connection	Ongoing

**Table 8: Strategic Priority #3: Grow Musician talent pool within Central Alberta**

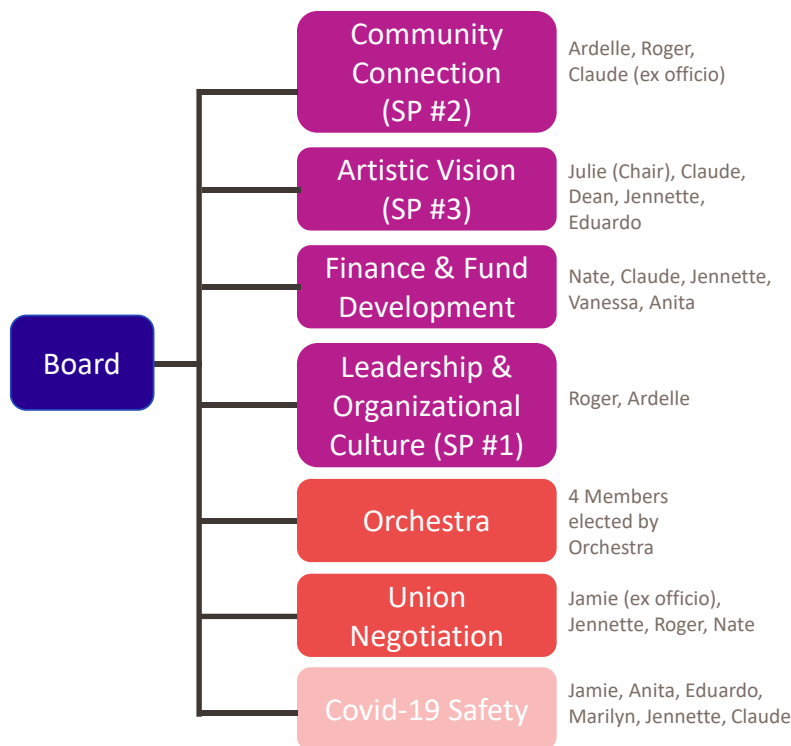
Strategic Priority #3: Infrastructure Development	Champion	Target Date
<b>3.1 Identify and prioritize strategic partnerships that extend the professional music talent pool in Central Alberta.</b>	Community Connection (Artistic Vision)	Year 1
a) Develop a partnership strategy that networks with Central Alberta music festivals.	Community Connection	Year 2
b) Develop a partnership strategy that engages music teachers in Central Alberta (e.g., Alberta Registered Music Teachers Association).	Community Connection	Year 2
c) Identify local rehearsal venue(s) within Red Deer.	Artistic Vision	Year 2/3
<b>3.2 Proactively recruit 'local' musicians from Central Alberta (i.e., within 80 km radius of Red Deer).</b>	Community Connection (Artistic Vision)	Year 2/3
a) Formalize long-term recruitment strategy for musicians.	(Orchestra)	Year 2/3
b) Establish long-term recruitment targets to increase representation from Central Alberta.	(Orchestra)	Year 2/3
c) Explore opportunities to establish a musician recruitment strategy with post-secondary institutions offering music performance degrees/credentials within Central Alberta.	(Orchestra)	Year 2/3

## 4. Governance

### RDSO's Governance Structure

RDSO is comprised of 8 Directors which oversee four Standing Committees: 1) Community Connection; 2) Artistic Vision; 3) Finance & Fund Development; and, 4) Leadership & Organizational Culture. The Board has two Ad Hoc Committees: 1) Orchestra; and, 2) Union Negotiation (see [Figure 5](#))<sup>26</sup>. Each Committee is linked to a Strategic Priority, where appropriate. It is anticipated that the third Ad Hoc Committee, COVID-19 Safety, will be disbanded shortly.

**Figure 5: RDSO's Proposed Governance Structure**<sup>27</sup>



<sup>26</sup> RDSO Board Strategic Planning, Session #4 March 10, 2022.

<sup>27</sup> RDSO Board Strategic Planning, Session #4 March 10, 2022.

## Committee Mandates<sup>28</sup>

Committee	Mandate
<b>Community Connection</b>	<ul style="list-style-type: none"> <li>• <i>Grow Community Connection</i></li> <li>• <i>Re-orient the RDSO to reach a broader community</i></li> <li>• <i>Identify and prioritize strategic partnerships</i></li> <li>• <i>Diversify programming to target core and growth audience segments</i></li> <li>• <i>Develop an Education Outreach Strategy</i></li> </ul>
<b>Artistic Vision</b>	<ul style="list-style-type: none"> <li>• <i>Works to actualize the objectives of the organization in collaboration with the Music Director in a fiscally viable manner.</i></li> </ul>
<b>Finance &amp; Fund Development</b>	<ul style="list-style-type: none"> <li>• <i>Develop revenue through grants, sponsorship, gaming, cash donation campaigns and fundraising events in a manner that supports the sustainable operation of the RDSO.</i></li> </ul>
<b>Leadership &amp; Organizational Culture</b>	<ul style="list-style-type: none"> <li>• <i>Annually reviews and updates all governance documents, including the Strategic Plan, By-laws, Policy Manual, Terms of Reference and Best Practices.</i></li> <li>• <i>Supports the development of the “people” aspect of the organization, namely Board members and volunteers.</i></li> <li>• <i>Supports the Board’s responsibilities for key leadership roles and organizational culture.</i></li> </ul>
<b>Orchestra</b>	<ul style="list-style-type: none"> <li>• <i>Liaise communication between the orchestra, union and RDSO Board including but not limited to Collective Bargaining Agreement issues.</i></li> <li>• <i>Work with the Personnel Manager to carry out Steward responsibilities; appoint an individual to act as the Steward in advance of each Main Series concert or Sold Service.</i></li> </ul>
<b>Union Negotiation</b>	<ul style="list-style-type: none"> <li>• <i>Works with the American Federation of Musicians (Calgary Musicians Association Local) union representative to negotiate a three-year agreement that is acceptable to the RDSO and the contract musicians.</i></li> </ul>
<b>COVID-19 Safety</b>	<ul style="list-style-type: none"> <li>• <i>Addresses health and safety concerns for staff, musicians and audience members as related to the Covid-19 pandemic.</i></li> </ul>

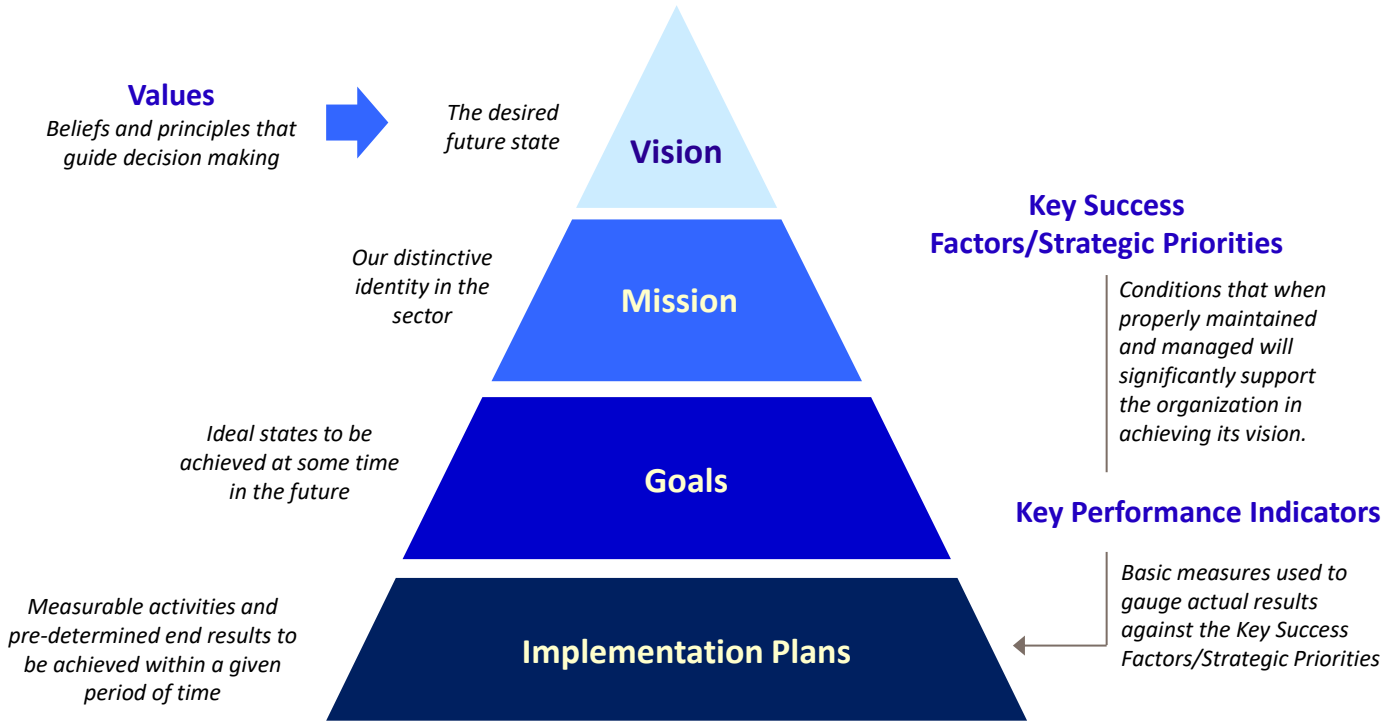
<sup>28</sup> RDSO Committee Allocation 2021-2022.



## Board Members & Terms

Name	Role	Term (2021-22)
Jamie L. Smith	President	Year 2 of 3-year term Board member since 2016
Roger Admiral	Vice-President	Year 2 of 3-year term
Anita Thomas	Secretary	Year 2 of 3-year term
Vanessa Mariani	Treasurer	Year 1 of 3-year term
Ardelle Ries	Board Director	Year 2 of 3-year term
Eduardo Sola	Board Director	Year 2 of 3-year term
Julie Thompson	Board Director	Year 1 of 3-year term
Nate Rempel	Board Director	Year 1 of 3-year term
Jennette Miller	Executive Director, Ex Officio	Since July 2021 Executive Assistant 2019-2021
Claude Lapalme	Music Director, Ex Officio	Since 1990

# Appendix 1: Strategic Framework<sup>29</sup>



<sup>29</sup> Finley & Associates Ltd.  
 Red Deer Symphony Orchestra – Strategic Plan 2022-2025  
 Finley & Associates Ltd. (22-03-18)

## Appendix 2: Glossary of Terms

<i>Action Priorities</i>	The specific steps, or tasks, needed to implement goals.
<i>Budget</i>	The month-by-month goals that have to be achieved to maintain an effective operating plan. The quantification of plans for revenues and expenses for control purposes.
<i>Goals</i>	Ideal states to be achieved at some time in the future.
<i>Key Success Factors</i>	Those conditions that when properly maintained and managed will significantly support the organization in achieving its vision.
<i>Mission</i>	Communicates the distinctive identity, or purpose, which the organization seeks within the sector.
<i>Objectives</i>	Measurable activities specific in terms of quantity, quality, cost, time and responsibility.
<i>Key Performance Indicators</i>	Basic measures used to gauge actual results against the Key Success Factors.
<i>Performance Targets</i>	A pre-determined end-result to be achieved within a given period of time.
<i>Presenting Orchestra</i>	The majority of the core musicians are primarily comprised of musicians from cities other than the one the Orchestra is located in.
<i>Professional Orchestra</i>	A large classical orchestra, including string, wind, brass, and percussion instruments. The core musicians are all professionally trained.
<i>Situation Analysis</i>	An evaluation of current issues, trends, and future developments for the sector, and SWOT analysis.
<i>Strategic Planning</i>	An iterative activity focused on discussion and consensus building resulting in well-defined action. A systematic and continuous disciplined approach to analyzing trend indicators about markets, competitors, strategies and product mix. Sets parameters for future growth and details strategies to make that growth happen.
<i>Strategy</i>	Enduring guidelines within which decision-making is carried out.
<i>SWOT Analysis</i>	Assessment of an organization's internal strengths and weaknesses, and external opportunities and threats. The analysis assists in the identification and prioritization of action.
<i>Vision</i>	A statement of the desired future state of the organization.
<i>Values</i>	Fundamental principles and beliefs that serve as implicit criteria guiding all actions and decision-making.