



Lethbridge Symphony Association

Strategic Plan

2023-2026

We view this plan as a living document that incorporates emerging issues and/or initiatives. We commit to reviewing this plan periodically and updating it as necessary.

1. Introduction

In January 2023, the Board of Directors of the Lethbridge Symphony Association (LSA) as well as staff members, met to begin developing a new Strategic Plan that would provide guidance and direction to the organization for the next three years (June 2023 – May 2026). Following the COVID-19 pandemic, the landscape of art and culture in Southern Alberta has shifted. It is imperative that the LSA respond to the changing needs of our patrons, musicians, and staff while creating a sustainable organization in response to the economic challenges created since the pandemic.

2. Historical Highlights of the Lethbridge Symphony

A true community ensemble combining the talents of many of southern Alberta's finest musicians, the Lethbridge Symphony was founded in 1960, and incorporated as a charitable non-profit in 1961. Our first 50 years of music were created by volunteers, with a resident professional music director (starting in 1978), and a string quartet, Musaeus (founded in 1982). Under the leadership of music director Glenn Klassen, the skilled amateur players, outstanding local professionals, and talented students who make up the Symphony collaborate with many fellow community arts groups.

We produce several events every Season, including the Symphony Series (with the full orchestra), Intima (featuring smaller ensembles), Kids Choir, Feel the Beat, and Love Notes. Through specially designed programs such as Access Pass, Children's Pass, Feel the Beat, and Kids Choir, we introduce thousands of children to live classical music. Many of our area's leading performers, including the University of Lethbridge Opera Workshop and Conservatory of Music, Vox Musica Choral Society, Chinook Chamber Singers, and the Southern Alberta Suzuki Strings, are frequent partners.

Our diverse funding model brings together concert-goers, sponsors, donors, and government agencies to create a strong financial base. We are enormously grateful to our community of supporters – a family that brings great music to life in southern Alberta through continuing investment in our work. This allows the Lethbridge Symphony to continue inspiring thousands of people each year with memorable musical experiences for audiences of all ages.

Our history includes the following highlights:

2022-2023	The Symphony begins the first post-COVID season.
2021-2022	The Symphony celebrates its 60 th season as the COVID-19 pandemic shows signs of lifting. This season featured the Béla Bartók's Concerto for Orchestra – a masterpiece performed for the first time by the LSO which demonstrates our artistic growth.
2019-2020	The Symphony's concert season was cut short by the COVID-19 pandemic. Vicki Hegedus becomes Executive Director.
2017-2018	The Symphony's 57th Season, and Glenn Klassen's 15th as Music Director, kicks off with Shostakovich's Fifth Symphony; a milestone piece for any orchestra, even a fully professional ensemble, our musicians more than rise to the occasion.
2016-2017	The Symphony takes over the production reigns for Feel the Beat from the University of Lethbridge Conservatory of Music. Norbert Boehm celebrates his 40th Season as concertmaster; Melanie Gattiker becomes Executive Director.

2015-2016	The 55th Season of the Lethbridge Symphony closes with a bang: Carl Orff's Carmina Burana involves more than 300 orchestra musicians and choristers from the community, including Vox Musica, for two sold out performances.
2013	The Lethbridge Symphony's first dance collaboration is presented in May with the Troyanda Ukrainian Dance Ensemble, and three sold out performances of Les Misérables are presented to enthusiastic audiences in time for Christmas. Arts administrator David Shefsiek joins the Symphony organisation as interim executive director through the 2014-15 Season.
2012	In collaboration with the University of Lethbridge Opera Workshop and Vox Musica, the Lethbridge Symphony warmed the chilly month of February with a fully-staged production of WA Mozart's The Magic Flute, sung in English.
2010-2011	The Lethbridge Symphony celebrated 50 years of music.
2009-2010	The Lethbridge Symphony completed a comprehensive rebranding in anticipation of its banner 50 th Season.
2008-2009	The 10th Anniversary of the popular Broadway Musical collaboration between directors Fran Rude and Ken Rogers, and the Lethbridge Symphony Orchestra. The Symphony moved from the Yates Memorial Theatre to Southminster Church to accommodate a growing audience.
2005	In August, the orchestra shared the stage with country rock band Doc Walker for its second annual Symphony on the Green.
2003	Glenn Klassen was appointed Music Director of the Lethbridge Symphony.
2002 & 2003	As part of the Crowsnest Pass Rum Runner Days held every July, the LSO performed Music on the Mountain at the Pass Powder Keg Ski Resort.
2000-2001	Our 40th Anniversary Season opened with a Master Series concert in memory of Albert Rodnunsky. In May, we launched our annual Kids Choir, providing area elementary school choirs the opportunity to perform with symphonic accompaniment by members of the orchestra.
1998 & 2000	Music at the McIntyre, August afternoon concerts featuring the LSO and others were presented at the beautiful McIntyre Ranch near Magrath, AB.
1994	Claude Lapalme joined the LSO as Music Director.
1985	The inaugural Lethbridge Symphony Young Artist Competition was organized as part of our 25 th Anniversary Season.
1978	Music Director Stewart Grant's tenure began and included the formation of a core of resident professional string players now known as Musaeus, the Southern Alberta Chamber Orchestra, the creation of a Chamber Recital Series sponsored by the duMaurier Council for the Arts, and the Music for a Sunday Afternoon Series at the Southern Alberta Art Gallery.

1976	Professor JP Christopher Jackson became interim conductor and urged the engagement of a resident Music Director. Norbert Boehm succeeded Dr Clifford Palmer as Concertmaster.
1974	The Lethbridge String Instrument program was launched with the support of Alberta Culture, the local school boards, and the Kiwanis Club of Lethbridge. As part of this effort, professional violinist Norbert Boehm was hired, and the program was established at the Grade I level, using the Suzuki method.
1970	Professor Lucien Needham took over the baton. The Symphony offered a Season format, including the Annual Family Concert, and introduced run-out performances to the surrounding communities.
1961	The Symphony Women's League (SWL) was started to support the orchestra in various ways, including fundraising. Mr Rodnunsky assembled the Lethbridge Symphony Chorus, which lasted 15 years; its first chorusmaster was Tom Lavers.
1960	The Lethbridge Symphony was formed. Albert Rodnunsky served as its first conductor and Dr B Wayne Matkin served as its first president.

3. Mission, Vision and Values

As part of the Strategic Planning Process, the Mission, Vision and Values were reviewed. After considerable discussion, the mission and vision of the organization were confirmed to be:

Mission:

“To create and promote a first-class orchestra producing memorable musical experiences for audiences of all ages.”

Vision and Values:

The vision of the Lethbridge Symphony is to be an integral part of our community’s identity. We strive to achieve this vision through:

- Artistically diverse performances by orchestra members and guest artists that evoke joy, stimulate growth and promote learning,
- A welcoming and inclusive environment for musicians, board members, staff, patrons and the broader community,
- Collaborative partnerships with educational & community institutions designed to support and promote music appreciation and education, and
- Financial stewardship and sound business management practices.

4. Strategic Framework

The Strategic Planning Workshop identified three pillars of success for the LSA: Listen and Act, Establish Financial Stability, and Create Partnerships. These are the pillars of our Strategic Plan. For each of these pillars, a broad goal was established:

Listen and Act: Listen to our patrons, musicians, donors, sponsors, and volunteers to tailor our services to their needs and expectations. Establish effective lines of communication between the Board of Directors, staff, musicians, and volunteers, enhancing focus on the LSA’s key priorities and retaining our best people.

Establish Financial Stability: Respond effectively to factors surrounding the LSA (political, economic, and environmental) and foster strong relationships with donors and sponsors to create a financially sustainable organization.

Create Partnerships: Attract allies and partners of the LSA, establish advocates with municipal and provincial governments, and create clear priorities for the growth and support of the arts in the community.

5. Action Plans

For each of the above priorities, a number of action plans were developed to support each goal.

Pillar I: Listen and Act

Listen to our patrons, musicians, donors, sponsors, and volunteers to tailor our services to their needs and expectations. Establish effective lines of communication between the Board of Directors, staff, musicians, and volunteers, enhancing focus on the LSA's key priorities and retaining our best people.

Action	Strategy	Specific Tasks	Responsibility	Timeline	Resources	Measurement of Success
Confirm Priorities of our Patrons and Musicians	Confirm the priorities and values of our musicians and patrons to better tailor our approach to their needs	<p>Conduct focus groups, advertised with our subscribers and musicians.</p> <p>Summarize findings and provide a report to the Board of Directors.</p> <p>Develop and implement key initiatives to respond to these needs.</p> <p>Conduct City of Lethbridge Surveys to meet KPIs as outlined in the 2022 Business Case</p>	<p>Marketing & Fundraising Committee and Executive Director plans and executes the focus group.</p> <p>Board of Directors to review findings and provide direction on how to respond.</p> <p>Select Committees and Executive Director to implement key initiatives as identified by the Board of Directors.</p>	<p>October 2023 Focus Group</p> <p>December 2023 – Present results to the Board of Directors.</p> <p>May of Each Season – Conduct City of Lethbridge surveys and report findings</p>	Office staff; facilitator	Completed focus group. Summary of findings provided. Key initiatives developed and implemented.

Action	Strategy	Specific Tasks	Responsibility	Timeline	Resources	Measurement of Success
Generate a buzz for our organization	Enhance public knowledge of the LSA through targeted PR campaigns.	Develop and implement a PR campaign to bring awareness to the LSA.	Marketing and Fundraising Committee	Plan a PR campaign – Q2 2024 Implement the PR campaign – Q3 2024	Office staff, volunteer hours	PR campaign reaches 20,000 individuals in the community.
Diversify our service offerings to reach a new audience.	Develop new services to expand the audience of the LSA. Create tailored experiences for underrepresented groups in our audience.	Using the feedback received from the focus group, develop additional services in collaboration with individual musicians and ensembles. Work with the Music Director and Executive Director to develop family-focused performances. Maintain focus on services that will provide the most impact with the least cost to the LSA.	Marketing & Fundraising Committee / Music Director / Executive Director	Provide a proposal for new initiatives to the Board of Directors - Q1 of each year.	Office staff, volunteer hours, allocation of funding as required.	The Lethbridge Symphony develops additional service offerings to appeal to a different audience.

Action	Strategy	Specific Tasks	Responsibility	Timeline	Resources	Measurement of Success
Formalize Board of Directors Style and Role	Create clear expectations for Board members and function of the board. Focusing our efforts on governance matters.	<p>Develop a flow chart to determine key functions of the Board of Directors and how it relates to the committees</p> <p>Reestablish the Executive Committee to effectively manage initiatives from committees to the Board of Directors</p> <p>Conduct annual reviews of the Board of Directors, Executive Director, and Music Director</p>	<p>Board of Directors – Flow chart creation.</p> <p>Executive Committee</p> <p>President and Vice President – Annual Reviews</p>	<p>Q3 2023 – Flow Chart</p> <p>Q3 2023 – Reestablish the Executive Committee</p> <p>Q2 – 2024, 2025, 2026 – Annual Reviews</p>	N/A	<p>Flow chart created and approved by the LSA Board of Directors.</p> <p>Clear lines of communication established between the committees, Executive Committee, and the Board of Directors.</p> <p>Annual reviews completed and documented by the President and Vice President.</p>
Effectively communicate with our Musicians and Patrons	Provide a consistent face and voice to the LSA, fostering communication and collaboration.	Provide an update to our musicians as part of each rehearsal cycle for the Series concerts	President	Once every Series cycle.	President to prepare an update on behalf of the Board	President presents to the musicians on a regular basis, fostering open communication between all levels of our organization.

Action	Strategy	Specific Tasks	Responsibility	Timeline	Resources	Measurement of Success
Celebrate and retain our people	Protect our institutional knowledge and skillset by effectively managing morale of our staff, musicians, and volunteers.	<p>Expand our Musician Spotlight to feature musicians, staff, and volunteers in our organization.</p> <p>Provide opportunities for musicians to share their external ensembles through the “Hire a Musician” program.</p> <p>Complete an oral history program of the LSA</p>	<p>Marketing and Fundraising Committee – Musician Spotlight and Hire a Musician Initiatives</p> <p>Oral History - Historical Committee</p>	<p>Develop an expanded Musician Spotlight – Q3 2023</p> <p>Implement the new Musician Spotlight – Q3 2023</p> <p>Implement the “Hire a Musician” Program</p>	<p>Volunteer to coordinate the Musician Spotlight and Hire a Musician Initiatives.</p> <p>Funding grant required to completed the oral history program</p>	<p>Musicians response to a survey indicate a majority of respondents are satisfied or very satisfied with the efforts of the LSA to highlight our people.</p> <p>Oral history program completed.</p>

Pillar 2: Establish Financial Stability

Respond effectively to factors surrounding the LSA (political, economic, and environmental) and foster strong relationships with donors and sponsors to create a financially sustainable organization.

Action	Strategy	Specific Tasks	Responsibility	Timeline	Resources	Measurement of Success
Practicing due diligence in response to the current economy	Closely monitor our organization’s financial position to allocate our resources effectively.	<p>Create a simplified financial plan that identifies the overall financial health of the LSA.</p> <p>Develop a projected cashflow tool to determine the timing of revenues and expenses throughout the year.</p> <p>Focus on developing realistic and obtainable financial goals as part of annual planning.</p>	<p>President and Treasurer to lead the development of a simplified financial plan and projected cashflow tool.</p> <p>The Board of Directors to provide direction on spending priorities and assess the practicality of each budget.</p>	<p>Simplified Financial Plan to reviewed at each board meeting.</p> <p>Projected cashflow tool used as need to establish challenges in cashflow.</p>	Time and effort. Monthly meeting with the President, Treasurer, and staff to review our finances.	Comprehensive financial planning documents that are realistic within our current environment.

Action	Strategy	Specific Tasks	Responsibility	Timeline	Resources	Measurement of Success
Expand Donation Initiatives	Expand our current donation programs to create a strategic cashflow throughout each season.	<p>Develop and implement a legacy giving program.</p> <p>Review the existing 50/50 Raffle Campaign and adjust so that it is a successful recurring initiative.</p> <p>Develop an “Adopt a Musician” campaign, allowing individuals to support sections of our orchestra.</p>	Marketing and Fundraising Committee	<p>Legacy Giving Campaign – Q3 2023</p> <p>50/50 – Review Q3 2023</p> <p>Adopt a musician – Implement Q3 2023</p>	Office staff, volunteer hours, legal counsel (specific to legacy giving)	<p>Legacy giving program implemented</p> <p>50/50 Raffle campaign consistently generates at least \$2,000 per draw for the Lethbridge Symphony.</p> <p>Adopt a musician campaign implemented and generates \$2,000 each season.</p>
Expand Sponsors and Business Relationships	Expand our sponsorship programs to appeal to businesses, generating essential revenue for each season.	<p>Review the sponsorship and advertising package annually to verify if requested amounts align with goals.</p> <p>Conduct regular in-person meetings with potential sponsors. With the majority occurring January – June of each year.</p> <p>Ensure a high quality of service to each sponsor to encourage continued support.</p>	<p>Executive Director</p> <p>President</p> <p>Marketing and Fundraising Committee</p>	<p>Package Review – January of each season</p> <p>In-person sponsor meetings – Q1-Q2 of each season</p>	Office staff, volunteer hours, legal counsel (specific to custom sponsorship agreements)	Meet projected sponsorship targets as identified in each operating budget.

Pillar 3: Create Partnerships

Attract allies and partners of the LSA, establishing strong relationships with municipal and provincial governments and creating clear priorities for the growth and support of the arts in the community.

Action	Strategy	Specific Tasks	Responsibility	Timeline	Resources	Measurement of Success
Establish Partnerships with Student Musician programs	<p>Create a clear line of progression for young musicians to join the LSA.</p> <p>Secure our future talent in the community by establishing a clear goal for our youth.</p>	<p>Provide an opportunity to have a music group perform with members of the LSA.</p> <p>Create a partnership program with Gabe Kastelic's orchestra.</p>	Artistic Committee / Music Director / President	Q2 2024	Budget to provide honorarium to partner organizations.	<p>Clear partnerships and shared communication developed for the Lethbridge Symphony and partner organizations.</p> <p>Collaboration with the Lethbridge Symphony and a partner organization to provide one performance in 2024.</p>

Action	Strategy	Specific Tasks	Responsibility	Timeline	Resources	Measurement of Success
Determine advocacy priorities for the Lethbridge Symphony	Clearly establish the priorities of the LSA as it relates to municipal and provincial organizations	<p>The Board of Directors to meet and discuss who in the provincial and municipal organizations would best support the organization.</p> <p>Develop strategies for advocating for the LSA with these individuals / parties.</p> <p>Develop a policy for our position on a new Performing Arts Centre in Lethbridge.</p>	Board of Directors	Q1 2024	Research into the positions of political organizations and candidates.	Clear advocacy priorities developed for the Lethbridge Symphony that will allow our organization to push for additional support from our governments.