

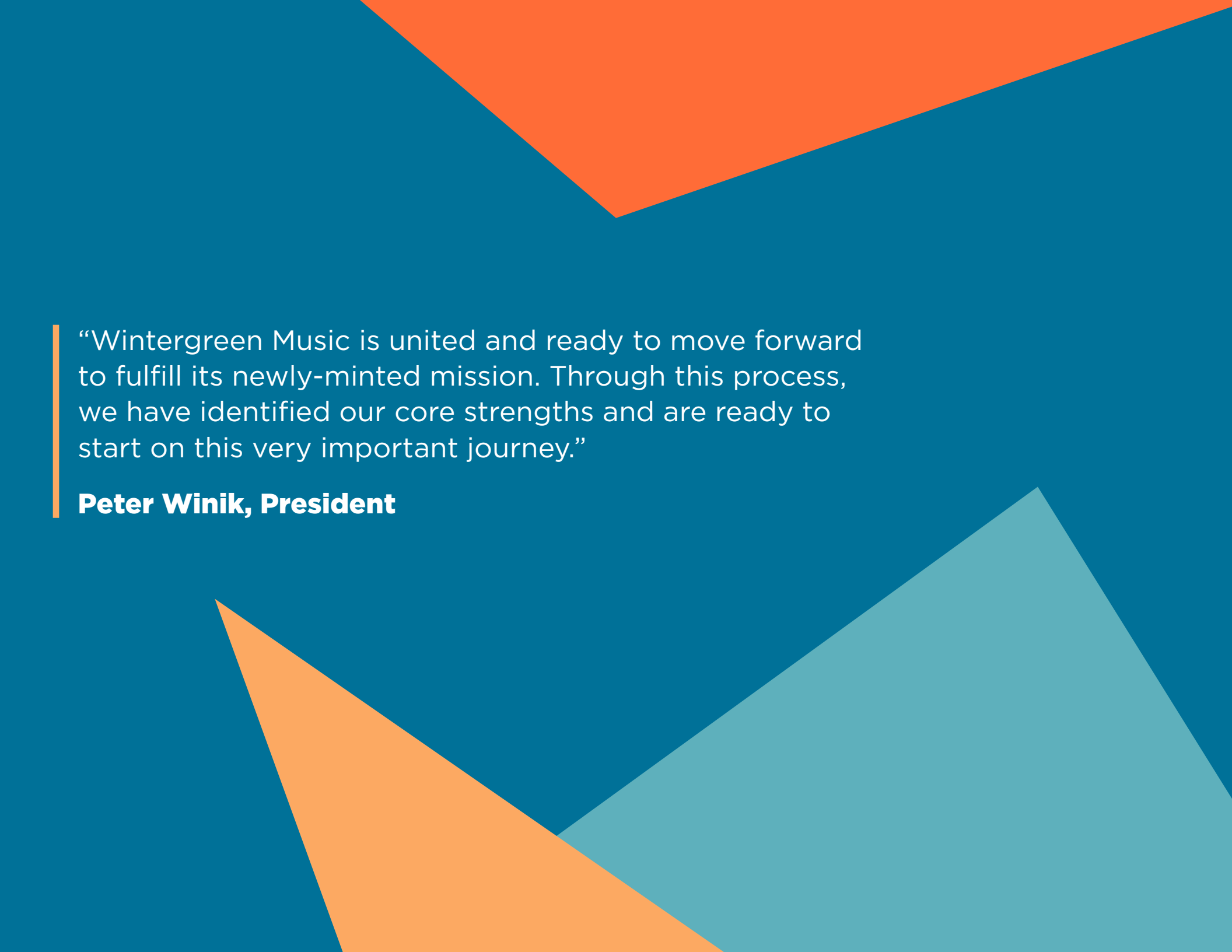


WINTERGREEN
MUSIC

DESTINATION
COMMUNITY
ARTISTRY

2019-2023
Strategic Plan





“Wintergreen Music is united and ready to move forward to fulfill its newly-minted mission. Through this process, we have identified our core strengths and are ready to start on this very important journey.”

Peter Winik, President

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Overview & Plan Summary

For more than two decades, Wintergreen Music (WM, formerly known as Wintergreen Performing Arts) has enriched and inspired our patrons and trained the next generation of musicians, while creating a close and vibrant music-loving community amidst the breathtaking beauty of the Blue Ridge Mountains. This Strategic Plan charts a path of sustainable and dynamic growth for WM and its flagship offering, the Wintergreen Music Festival and Academy.

Strengths & Opportunities

WM's Board of Directors has adopted this Strategic Plan at a time of strength and opportunity. Among other things:

- We have experienced healthy growth in our audience, ticket revenues, and Academy student population.
- We have stable and excellent professional leadership.
- New leadership of Wintergreen (Resort) – the home of the Wintergreen Music Festival and Academy – is committed to enhancing public awareness of the Resort as a vibrant and attractive summer destination, creating an opportunity for aligned growth of the Wintergreen Music Festival and Academy.

Challenges

At the same time, we face the same array of challenges that most arts nonprofit organizations confront. To build on our past success and recent momentum, and as discussed more fully in this Strategic Plan, Wintergreen Music has established several priorities, including:

- Marketing initiatives to raise the profile of the Wintergreen Music Festival and Academy to assure that we continue to grow our base of patrons as well as our Academy student population.
- Renewed focus on Development, including the establishment of an endowment and operating reserves and consideration of a Capital Campaign.
- Assuring the availability of suitable performance venues as well as rehearsal, dining, operational, and housing facilities.
- Continued evolution of artistic excellence of our Festival artist, Academy faculty, and student populations.
- Growth and diversification of programmatic offerings.
- Expansion of WM's administrative staff and infrastructure.
- Recruitment and development of a mission-aligned Board of Directors.



Mission

Wintergreen Music inspires, educates, and welcomes audiences, students, and professional musicians alike through the transformative power of music.

Vision

WINTERGREEN MUSIC ASPIRES ALWAYS TO:

- Achieve excellence in musical performance and teaching;
- Be nationally recognized as a top-tier summer classical music Festival and teaching Academy;
- Be a model of inclusive and inviting community building through music making;
- Draw audiences regionally, nationally, and internationally;
- Attract world-class professional musicians from symphony orchestras and chamber music groups across the country; and
- Recruit passionate and high-quality students to benefit from the Academy and become long-term members and supporters of the WM community.

Values

AT OUR BEST, WE ARE A COMMUNITY THAT IS:

- Welcoming and Open-minded
- Collaborative and Accountable
- Inspirational and Aspirational

WELCOMING AND OPEN-MINDED BY:

- Seeking ways to expand and champion inclusiveness and fresh perspectives;
- Presenting programs in formats and venues that attract a diverse range of audiences; and
- Engaging with stakeholders.

COLLABORATIVE AND ACCOUNTABLE BY:

- Considering the organization first, always;
- Establishing partnerships throughout the region;
- Honoring lessons learned with a forward-looking spirit of perfecting our mission;
- Displaying humility in our actions with others;
- Taking responsibility and encouraging a communal sense of ownership; and
- Safeguarding our future through judicious management of resources.

INSPIRATIONAL AND ASPIRATIONAL BY:

- Creating a nurturing and supportive environment for our professional, community, and student artists and administrators alike to challenge themselves;
- Developing programs that inspire audiences and performers alike to champion music at Wintergreen and their home communities; and
- Striving for excellence and encouraging others to do so.



Organizational Pillars

WE WILL WORK TO ACHIEVE OUR VISION OVER THE NEXT FOUR YEARS THROUGH INITIATIVES ORGANIZED INTO THE FOLLOWING 'PILLARS':

- Destination
- Community
- Artistry
- Administration & Governance
- Development, Marketing & Finance

Destination

Through our artistic product, marketing efforts, facility improvements, and relationships with partner organizations throughout the region, promote Nelson County as a nationally recognized destination for cultural, natural, and culinary experiences.

SUB-TOPICS:

- Housing
- Permanence & Planning
- Partner Offerings
- Patron Experience



HOUSING: Create a more ready supply of housing for musicians, students, staff, and patrons in order to draw more patrons to the area and find cost-efficient solutions for the organization.

YEAR 1 | Hire part-time staff person on year-round basis to recruit free and reduced-cost housing for musicians, students, and staff.

YEARS 1-3 | Develop and improve collaborative housing offerings with Resort to increase destination attractiveness for patrons.

PERMANENCE & PLANNING: By the very nature of our location and history, we have traditionally worked closely with Wintergreen Resort, planning on a year-to-year basis. We aim to move to a model that encourages long-term artistic, financial, and location planning, securing our future as an artistic destination for years to come.

YEAR 1 | Work with Wintergreen Resort to develop a multi-year Memorandum of Understanding concerning the Wintergreen Music Festival.

YEAR 2 | Develop a plan for securing long-term space needs, including dining, practice and lesson spaces, community gathering area, office presence, and performance venue.

YEARS 2-4 | If the long-term space needs point to new construction, explore partnerships and funding (see “Development, Finance & Marketing” pillar).

PARTNER OFFERINGS: In recent years, Nelson County has experienced growth in the tourism industry, with an influx of exciting wineries, breweries, outdoor attractions, and more. We have developed partnerships with several of these area businesses and plan to continue that work to enhance the destination experience for our patrons, musicians, and students.

YEAR 1 | Build upon newly developed relationships with Nelson County businesses, creating meaningful experience packages to broaden our audience.

YEARS 2-3 | Create strategic partnerships with artistic organizations in the region – either during the Festival season or throughout the rest of the year.

YEARS 2-4 | Continue to research and implement new business partnerships each year to play a vibrant role in the growth and activities of the area.

PATRON EXPERIENCE: Understanding that ancillary details can make or break a guest’s commitment to the organization, update and modernize several non-musical aspects of the Festival experience, creating a welcoming atmosphere from start to finish. Initiatives to include:

YEAR 1 | Improve signage to events.

ON-GOING | Address creature comforts such as tent temperature, seating, and clear walkways.

ON-GOING | Continue to upgrade food and drink options, particularly through regional partnerships.

Community

Building on more than two decades of creating community through music, become a model of inclusive and inviting community building through music making.

SUB-TOPICS:

- Community Outreach
- Community Building
- Volunteer Community
- Community is Dynamic Concept

Note: Our surveys indicate that one of the most attractive features of the Festival and Academy is the strong sense of community that is fostered between patrons, volunteers, artists, and students. Additionally, we are aware that the Wintergreen community sits in Nelson County, an area with a wide socio-economic divide. We take seriously our opportunity and obligation to educate, inspire, and unite this broader community.



COMMUNITY OUTREACH: Building upon recent initiatives, such as work with the Boys and Girls Club and Nelson County Schools, expand outreach to broaden and deepen our work with underserved communities.

YEARS 1-2

Explore and apply to additional granting organizations (musical and non-musical) that would fund a more robust service component to our performances.

YEAR 1

Convert our Music In Unusual Places student performance initiative to include more service-based concerts throughout the region.

YEAR 2

Partner with Nelson County Community Fund to find additional outreach performance opportunities for students and professionals.

COMMUNITY BUILDING: Create social opportunities around concerts and events to build upon our reputation as an inclusive and welcoming Festival and to invite a broader range of patrons into the community.

YEAR 1

Develop new social events and gathering opportunities to address and cultivate different audiences.

YEAR 2

Identify a central meeting place for students, professionals, and patrons to gather throughout the Festival.

VOLUNTEER COMMUNITY: WM was founded by volunteers many years ago and has a rich tradition of welcoming new community members through volunteer service. As WM continues to scale and grow, it is important to ensure the ongoing vitality of this volunteer community. In 2017, WM founded a new Volunteer Guild to continue this work.

YEAR 1

Create social opportunities for Volunteer Guild engagement and growth.

YEARS 1-3

Develop organizational structure and targeted initiatives for the Volunteer Guild, increasing its profile and effectiveness. Initiatives might include formalization of membership and leadership, annual awards presentations, and representation on the WM Board.

“COMMUNITY” IS A DYNAMIC CONCEPT: Explore the definition of the WM community beyond Nelson County in a focused manner, taking into account current major geographics of WM patrons and targeted areas for expansion.

YEAR 1

Research areas for expansion of WM programs and events during or outside the Festival in regions outside the immediate Wintergreen community.

YEAR 1

Host affinity events throughout the year in some of our current key cities, to enhance and expand our community.

YEARS 2-3

Expand year-round affinity events and summer programs to targeted locations.



Artistry

Develop a national reputation for artistic excellence, creativity, and diversity, attracting high-level professional and student musicians from nationally recognized performing and educational institutions.

SUB-TOPICS:

- Program Offerings
- Artistic Excellence
- Artistic Spaces
- Artistic Technology

Note: Since the early days of the organization, Wintergreen Music has been equally committed to the presentation of professional musicians and the education of music students. The points embedded below apply to both our Festival offerings (i.e. professionals) and our Academy (i.e. students).

PROGRAM OFFERINGS: Increase and/or update program offerings to further inspire and engage audiences, students, and musicians alike.

YEAR 1

Diversify select repertoire, concert experiences, and Academy programs to engage with a broader audience and create entry points into classical music.

ON-GOING

In collaboration with community partners, explore new ways to present classical music, building on our innovative presentations to date.

YEARS 1-2

Modernize and further professionalize production of performances, refining patron experience.

YEARS 1-3

Renew organization's unique commitment to chamber music through Academy and Festival programming, commissions, and special initiatives.

ARTISTIC EXCELLENCE: Increase caliber of Guest and Festival Artists and Academy Students, elevating our artistic reputation nationally and enhancing the patron experience.

YEAR 1

Develop musician retention and growth plan.

YEAR 1

Create an artistic task force to address artist and artistic issues, such as contracts, repertoire, and safety.

YEAR 2

Increase merit-based scholarships for students.

YEAR 2

Increase number and/or depth of work of Artists-in-Residence.

YEARS 2-3

Develop a plan to expand availability and funding for rehearsal time.

ARTISTIC SPACES: Continually evaluate and refine options for rehearsal, lesson, and performance spaces needed for musicians, Guest Artists, and students.

YEAR 1

Refine organization of and communication about practice and rehearsal spaces for artists and students.

YEARS 1-2

Identify new practice and rehearsal spaces for musicians and students in private homes, throughout the Resort, and with other partner organizations.

YEARS 1-2

Identify additional high-potential and creative performance spaces throughout the region to expand reach.

ARTISTIC TECHNOLOGY: Focus on enhancing our technological capacity to improve quality and expand our reach.

YEAR 1

Research potential funding sources for Artistic Technology improvements.

YEAR 2

Investigate and finalize the collection and distribution of the Michael White archives.

YEARS 1-2

Update and finalize archiving of WM recordings.

YEARS 1-2

Invest in updated technology for main performance tent and satellite locations, including amplification, recording, and lighting.

YEAR 3

Aim for regional and national distribution of live recordings and/or archives.

Administration & Governance

As Wintergreen Music continues to grow in size, stature, and reach, we need to assure that our administrative support and governance structure evolve correspondingly.

SUB-TOPICS:

- Staff Structure
- Organizational Systems & Technology
- Board Development





STAFF STRUCTURE: Develop staffing and succession plans for operational efficiency and to ensure that appropriate resources exist for the long-term organizational health of Wintergreen Music.

YEAR 1

Evaluate staffing needs and resources (and continue as needed), setting up continuum for administrative improvement.

YEAR 2

Create staff manual/handbook and combine with current operations handbook.

ORGANIZATIONAL SYSTEMS & TECHNOLOGY: Acknowledging the fact that Wintergreen Music work activity occurs both onsite and remotely, develop working systems that help all employees and volunteers work efficiently and communicate effectively.

YEAR 1

Further implement smart, but user-friendly, technology for both internal and external stakeholders.

ON-GOING

Research and implement organization and communication best practices for combining onsite and remote employees, volunteers, and Board members.

BOARD DEVELOPMENT: Continue to build a Board and Board systems that support implementation of the Strategic Plan.

YEAR 1

Refine overall committee structures and involvement and form Governance task force to assure bylaws align with strategic objectives.

ALWAYS: Recruit new Board members who represent a variety of skill sets, networks, and perspectives, and who can help assure the financial viability of Wintergreen Music.

ON-GOING

Improve communication and information systems.

Development, Marketing & Finance

Increase our financial capacity by developing comprehensive, modern, and industry-standard models of fundraising, marketing, and financial controls.

SUB-TOPICS:

- Individual Giving & Grants
- Corporate & Government Affairs
- Fundraising Beyond Operational Budget

MARKETING:

- Marketing Capacity

FINANCE:

- Best Practices for Fiscal Responsibility

DEVELOPMENT: Individual Giving & Grants

YEAR 1	Increase awareness of Planned Giving Program.
YEAR 1	Identify grants (artistic and community-based) that support the initiatives of the Strategic Plan.
YEARS 1-3	Building off of increased audience and alumni bases, identify, develop, and expand new donor pool.
YEARS 1-3	Research, test, evaluate, and implement strategies and benefits to cultivate, develop, thank, and move donors along the spectrum of giving, while expanding overall levels of commitment.
YEARS 2-3	Using research of new grant opportunities, begin application cycles for new foundational support.

DEVELOPMENT: Corporate & Government Affairs

YEAR 1	Identify new community businesses by networking and cultivating throughout the year.
YEAR 2	Build on corporate cultivation to establish new and deepen existing strategic partnerships and sponsorships.
YEARS 1-2	Identify and cultivate local and state government leaders. Pinpoint how WM can contribute to their work leading the region.

DEVELOPMENT: Fundraising to Address Needs Beyond Operational Budget

YEAR 1	Create Operating Reserve Fund from special donations, bequests, and any operating surplus.
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YEARS 1-2

YEARS 2-4

Consider options and test viability for an endowment fund, scholarships, and if needed, a Capital Campaign. Pursue Capital Campaign and other long-term fundraising.

MARKETING: Build Marketing Capability to Support Strategic Vision

YEAR 1

Engage in brand refresh process to better align public brand association with core values and mission.

ON-GOING

Research and plan marketing strategy to reach current and growing audiences, including interactive social media plans.

ON-GOING

Complement paid marketing with grassroots and alternative marketing efforts.

ON-GOING

Leverage all stakeholders to 'activate existing networks,' such as alumni, musicians, and partner organizations, increasing overall awareness of WM.

FINANCE: Best Practices for Fiscal Responsibility

YEARS 1-3

Evaluate current and potential revenue streams to identify innovative opportunities for funding.

YEAR 1

Evaluate financial framework and guidelines through Finance Committee and Board, updating as needed with any staff restructure.

YEAR 1

Develop and enhance process for financial monitoring and reporting.

YEARS 1-3

Evaluate and adopt best practices for records retention, fiscal organization, and data security.



Notes



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