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STULBERG
INTERNATIONAL STRING COMPETITION
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Strategic Plan 2019



Violinist Felicity James, Pianist Andrea Swan, and Page Turner Eric Clifton at the 2015 Stulberg Competition

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Introduction

In Kalamazoo and other communities, music and other arts organizations are facing new challenges and opportunities: Access through new technologies and the electronic age offer alternatives to attending live performances; increasing social and community needs are impacting funding support, as is growing competition with other non-profits. Arts organizations everywhere are looking to sustain while expanding on their history of success.

The Stulberg International String Competition was initiated through “round-kitchen table” discussions of family and friends following the death of Julius Stulberg, respected educator and Director of Kalamazoo’s Junior Symphony Orchestra (for more than 30 years). The focus of those first discussions was to honor Stulberg’s lifelong commitment to music by advancing opportunities for the Junior Symphony’s gifted string players. More than 40 years later, the Stulberg has grown to become known internationally as one of the leading competitions for string players under the age of 20.

In consideration of potential new partnerships, raising community awareness and support, and a desire to establish a comprehensive succession plan, the Stulberg staff and Board of Directors embarked on a Strategic Planning Process in the Fall of 2018. The information contained within this document is a result of that process and serves as a road map for staff and Board decision-making processes for the next 3-5 years. By setting goals and identifying strategies to further achieve our organization’s mission and vision (“to deepen community engagement while offering a premier string competition”), our commitment to the Stulberg and the community we serve will be strengthened by implementation of this focused plan.

Linda Depta

President, Board of Directors

Linda Depta, Colleen McBride, Jane Rooks Ross, Chris Shook, Margaret Hamilton

Strategic Planning Team



Cellist Cullen O'Neil and Judge Eric Kim at the 2015 Stulberg Master Class

Our Mission and Vision

Our Mission

Promote excellence
in string instrument performance
by gifted artists under the age of twenty.

Our Vision

Deepen community engagement
while offering
a premier string competition.



2018 Stulberg Judges & Medalists:

Judge Aaron P. Dworkin, Bronze Medalist Maya Anjali Buchanan, Judge Scott St. John,
Gold Medalist Charlotte Marckx, Silver Medalist La Li, Judge Anthony Ross

Our History

One evening in 1975, a small group of friends and colleagues of the late Julius Stulberg met around the kitchen table of his widow, Esther Lieberman Stulberg. Their purpose that evening was to determine the most appropriate form of memorial to establish in honor of Julius and his life's work. At the time of his death in 1974, Julius Stulberg was Professor of Violin at Western Michigan University and Conductor of the University Symphony, positions he had held for 28 years. He had also been conducting the Kalamazoo Junior Symphony Orchestra for 31 years. Under his direction, the youth orchestra had grown from a "pay-as-you-play" endeavor (the participants paid a quarter as they came in the door for rehearsals) to an ensemble of international prominence.



Julius Stulberg

Julius Stulberg was a violin teacher of considerable repute. His former students have played in many of the major orchestras of the United States and Europe, and his impact on the lives of young musicians is immeasurable. It was out of a desire to memorialize Julius Stulberg's commitment to youth and music that the Stulberg International String Competition was born. At the time, organizers hoped that the Competition would exist for at least five years, with the goal of bolstering Kalamazoo Junior Symphony membership. Those hopes were exceeded almost immediately!

In the years since its creation, the organization has seen tremendous growth, developing from a regional event to an internationally recognized competition. Over the decades, more than one hundred young musicians have been awarded a Stulberg medal, and many have achieved illustrious careers in the fields of music performance and education. The Competition consistently attracts adjudicators and musicians from the highest echelon of artistic excellence. Stulberg medalists have gone on to significant artistic careers, as exemplified by such luminaries as Joshua Bell, Jennifer Koh and Benjamin Beilman. A complete roster of Stulberg medalists and judges appears at www.stulberg.org – a veritable "Who's Who" of the classical string world.



Esther Stulberg

The performance scope of the Competition has also increased over time, as collaborations with symphony orchestras provide growth opportunities for these gifted young artists. Stulberg medalists solo with the Kalamazoo Symphony Orchestra, the Grand Rapids Symphony, the Baltimore Chamber Orchestra, the Western Michigan University Symphony Orchestra, and the Kalamazoo Junior Symphony Orchestra. The Kalamazoo Bach Festival Society shares in providing the Bach Award, a cash prize given to the best performance of a Bach piece by a semifinalist. A variety of events - community engagement, fundraisers, musical salons, and recitals - allow the Stulberg to present a year-round calendar of activities, in addition to the annual Competition and Master Classes.

Our History – continued

Throughout the years, the Stulberg has remained true to these guiding principles: provide a nurturing atmosphere for young talent, feature judges of the highest caliber, and maintain the integrity for which Julius and Esther Stulberg were known. The Stulberg's mission is to promote excellence in string instrument performance by gifted artists under the age of twenty. It is unique in the field of music competitions because of its longevity, reputation for excellence, the quality of its judges, and its focus on young musicians. Its objective is to provide valuable educational and performance opportunities for young musicians – locally, nationally and internationally - so they may learn and grow and be better prepared for their college studies and performance careers.

In speaking of the Stulberg's impact, world-renowned violinist Joshua Bell said in a Newsweek magazine interview, "The competition ended up launching my career and my confidence in a lot of ways. It was a turning point and a lesson I use to this day."



1980 Stulberg violinists Hae-Young Ham (gold medalist), Se Yon Sandy Kim (silver medalist), and Joshua Bell (bronze medalist) with Esther Lieberman Stulberg. Joshua Bell returned in 1981 to win the gold medal.

Our Strategic Framework

Our Mission

Promote excellence in string instrument performance by gifted artists under the age of twenty.



Our Goals

1. Stulberg actively supports the development and engagement of young artists – locally, nationally, and internationally
2. Local, national, and international audiences are deeply engaged in multi-faceted ways
3. Human resources are sufficient to advance the organization
4. Sustainable financial stability enables the organization to advance its mission and vision



Our Vision

Deepen community engagement while offering a premier string competition.

Our Goals and Strategies

Goal 1: Stulberg actively supports the development and engagement of young artists—locally, nationally, and internationally

1. Strategy a. Tactic	Target Date	Owner	Status
1. Review annually options for keeping the Competition viable	Jun 2019	Competition Committee and Exec Comm	
a. Review cash prizes annually			
b. Review compensation for screeners and adjudicators annually			
c. Formalize the annual post-Competition participant survey			
2. Promote the opportunity of field trips to the Competition	Mar 2020	ED and t.b.d.	
3. Investigate creating a Talent Development and Youth Engagement Committee	Jun 2020	Nominating-Governance Committee	
4. Expand performance opportunities for winners (e.g., the Baltimore Chamber Orchestra)	2021	ED and t.b.d.	
a. Talk with judges and other orchestras to develop performance opportunities			
5. Survey K-12 string players and their parents and teachers for what they need to grow musically	2020	ED and Alisa Carrel	
a. Determine whether to offer special workshops, Stulberg scholarships, or other supports			

Goal 1 – continued

1. Strategy a. Tactic	Target Date	Owner	Status
6. Increase the number of student volunteers at the Competition a. Determine possible benefits to the volunteers and the Stulberg	2021	ED and t.b.d.	
7. Discuss with the Kalamazoo Junior Symphony Orchestra the possibility of an initiative for local string players that builds upon the Stulberg name	2021	ED and t.b.d.	
8. Expand the database of local string teachers to promote the Stulberg	2021	ED and t.b.d.	
9. Connect returning medalists with young local string players	2021	ED and t.b.d.	

Goal 2: Local, national, and international audiences are deeply engaged in multi-faceted ways

1. Strategy a. Tactic	Target Date	Owner	Status
1. Promote daytime semifinals as short drop-in events	Jan 2019	Communications and Promotions Committee	
2. Encourage senior living organizations to bring their residents to live events	Mar 2019	Linda Depta	
3. Enhance the online experience	May 2019	Josh Koets	
4. Create a marketing plan	Dec 2019	Communication and Promotions Committee	
a. Create visuals throughout the community			
b. Attract young people to the Competition, Master Classes, and medal winner concerts			
c. Attract a more diverse audience (racial, economic, generational, etc.)			
d. Promote semi-finals as a no-cost high-quality local string event			
e. Explore ways to capitalize on the quality of the semi-finalists			
f. Involve WMUK, PMN to increase year-round exposure			
(1) Playback through the year			
(2) Explore creating our own "From the Top"			
g. Explore inviting local and out-of-town music groups to attend the Competition weekend			

Goal 2 – continued

x

1. Strategy a. Tactic	Target Date	Owner	Status
h. Create a young people press corps: impressions, “Press” lanyard			
i. Promote local art (live) – buy local			
j. More press at contestants’ locations > press release			
k. Write press releases for contestants’ communities			
l. Explore ways to attract local string families to live performances			
5. Determine appropriate audience participation activities at the Competition	Mar 2020	Competition Committee	
a. Explore an active role for audiences, especially for young people			
b. Consider audience awards (e.g., People’s Choice, Finals)			
c. Explore social media options			
d. Make the Saturday event fun and interactive			
e. Consider a cellphone zone at semi-finals (e.g., player bios)			
6. Investigate the cost and benefits of selling Stulberg memorabilia	Mar 2020	Communications and Promotions Committee	
7. Plan the 50-year anniversary (2024/2025 season)	Sep 2020	Special Committee	

Goal 3: Human resources are sufficient to advance the organization

1. Strategy a. Tactic	Target Date	Owner	Status
1. Determine if the executive director position could become full-time salaried with benefits for the next ED	Jun 2019	Finance and Executive Committee	
a. Determine cost			
2. Determine the feasibility of a part-time support position	Jun 2019	Finance and Executive Committee	
3. Develop a technology resource plan	Jun 2019	Finance and Executive Committee	
4. Annually review board composition to ensure board members have the skill set, passion, diversity, and commitment needed to advance the organization	Sep 2019	Nominating-Governance Committee	
5. Explore college internships	Jun 2020	ED	
6. Establish a formal volunteer development and recognition plan	Jun 2020	Nominating-Governance Committee	

Goal 4: Sustainable financial stability enables the organization to advance its mission and vision

1. Strategy a. Tactic	Target Date	Owner	Status
1. Create a 'donate' button for live stream	Apr 2019	Josh Koets	
2. Develop a comprehensive written fund development plan	Dec 2019	Development Committee, ED	
a. Investigate 50 th anniversary fund development activities			
b. Investigate growing the endowment in conjunction with the 50 th anniversary			
c. Expand annual fund requests to include alumni (i.e., artists, parents, judges, board members)			
d. Increase ads for string organizations in the program			
e. Increase number of sponsorships			
f. Create naming opportunities (e.g., silver medal, master class series, Bach award, legacy gifts)			
g. Communicate to audience how they can give and participate			
h. Grow base of individual donors (current and future)			
3. Explore friend-raising opportunities outside or before the Competition (e.g., informal outreach)	Jun 2020	Development Committee	

Measures of Success

An important element of any strategic plan is a description of success in quantitative ways. *Measures of success* define the qualitative aspects of success in pursuing Stulberg's mission and vision and accomplishing the strategic goals.

Planning participants brainstormed the following measures of success for Stulberg's mission, vision, and goals:

Operational Measures

1. Number of applicants
2. Number of collaborations with community organizations
3. Number of names in database
4. Quality of adjudicators
5. Quality of young players (per adjudicators)
6. Number of new donors
7. Master class applications
8. Master class participation
9. Number of volunteers

Outcome Measures

1. Career paths of contestants (1)
2. Anecdotal feedback (1, 2)
3. Ticket sales (Goals 2, 4)
4. Audiences at live events (2)
5. Online audience participation (2)
6. Online viewers (2)
7. Annual giving (4)
8. Online giving (4)

The final set of measures will be incorporated into the strategic dashboard template shown on the next page.

Targets define the quantitative aspects of success for each measure. In the absence of established baselines or clear industry standards, targets may initially be left blank to avoid setting targets that are too low or too high. The first couple of data collection cycles will provide a baseline against which sensible targets may be established.

Dashboard Template

Stulberg International String Competition - Strategic Dashboard

Updated: December 17, 2018

Strategic Goals	2016	2017	2018	2019	2020	2021	Target	Target Date	Status
1. Stulberg actively supports the development and engagement of local young artists – locally, nationally, and internationally									
Career paths of contestants									▲
Anecdotal feedback									■
2. Local, national, and international audiences are deeply engaged in multi-faceted ways									
Ticket sales									
Audiences at live events									
Online audience participation									
Online viewers									
3. Human resources are sufficient to advance the organization									
4. Sustainable financial stability enables the organization to advance its mission and vision									
Annual giving									
Online giving									

Explanations

- 1. Text here
- 2. Text here

■ Meets or exceeds target

▲ Performance Up

■ Caution

■ No Performance Change

■ Below target - action needed

▼ Performance Down

Implementation Schedule

This schedule may be adjusted based on emerging priorities and budget amendments.

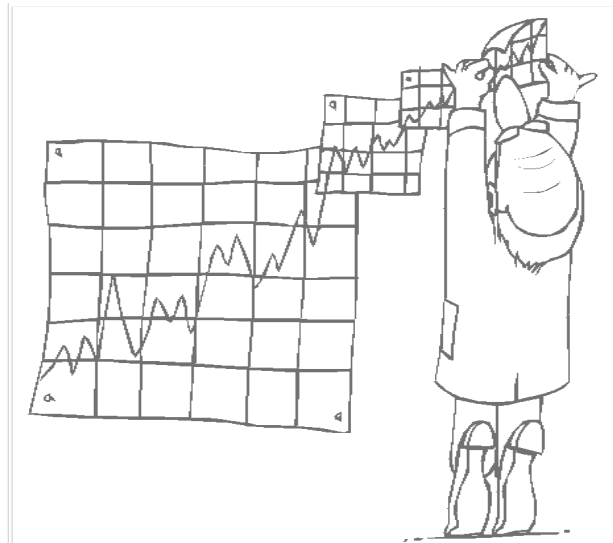
Strategies and Tactics (sorted by target completion date)	2019				2020	2021
	Q1	Q2	Q3	Q4		
2.1 Promote daytime semifinals as short drop-in events	Jan					
2.2. Encourage senior living organizations to bring their residents to live events	Mar					
4.1. Create a 'donate' button for live stream		Apr				
2.3. Enhance the online experience		May				
1.1. Review annually options for keeping the Competition viable		Jun			Jun	Jun
3.1. Determine if the executive director position could become full-time salaried with benefits for the next ED		Jun				
3.2. Determine the feasibility of a part-time support position		Jun				
3.3. Develop a technology resource plan		Jun				
3.4. Annually review board composition to ensure board members have the skill set, passion, and commitment needed to advance the organization			Sep		Sep	Sep
2.4. Create a marketing plan				Dec		
4.2. Develop a comprehensive written fund development plan				Dec		
1.2. Promote the opportunity of field trips to the Competition in the advance of each Competition					Mar	
2.5. Determine appropriate audience participation activities at the Competition					Mar	
2.6. Investigate the cost and benefits of selling Stulberg memorabilia					Mar	
1.3. Investigate creating a Talent Development and Youth Engagement Committee					Jun	
3.5. Explore college internships					Jun	
3.6. Establish a formal volunteer development and recognition plan					Jun	
4.3. Explore friend-raising opportunities outside or before the Competition (e.g., informal outreach)					Jun	
2.7. Plan the 50-year anniversary (2024/2025 season)					Sep	
1.4. Expand performance opportunities for winners (e.g., the Baltimore Chamber Orchestra)						2021

Implementation Schedule – continued

Strategies and Tactics (sorted by target completion date)	2019				2020	2021
	Q1	Q2	Q3	Q4		
1.5. Survey K-12 string players and their parents and teachers for what they need to grow musically						2021
1.6. Increase the number of student volunteers at the Competition						2021
1.7 Discuss with the Kalamazoo Junior Symphony Orchestra the possibility of an initiative for local string players that builds upon the Stulberg name						2021
1.8 Expand the database of local string teachers to promote the Stulberg						2021
1.9 Connect returning medalists with young local string players						2021

Next Steps and Implementation

- Communicate the Strategic Plan to all board members and key external key stakeholders – clearly and often.
- Have internal conversations on how board members and volunteers can contribute to advancing the mission and move the Stulberg to your vision.
- Develop and implement detailed tactical action plans as needed.
- Track progress and identify data trends.
- Focus on strategy throughout the year through strategy-based meeting agendas and annual progress reports.
- Regularly report updates and results to all key stakeholders.
- Use process and outcome metrics for continuous improvement toward service excellence.
- Celebrate success!
- Regularly review, validate, and update the strategies.



Planning Participants

We appreciate the contributions of these board members and the executive director who participated.

Linda Depta* President	Director of College Relations, Kalamazoo Valley Community College
Jane Rooks Ross* President Elect, Nominating-Governance Committee Chair	Arts Consultant
Chris Shook* Past President	President, Jim Gilmore, Jr. Foundation, Gilmore Real Estate LLC
David Johnson Secretary and Competition Committee Chair	Attorney, Legal Office of David J. Johnson, PLLC
Charles Wattles Treasurer and Finance Committee Chair	Portfolio Manager, Long Road Investment Counsel
Alisa Carrel	Director of Development, Gilmore International Keyboard Festival
Theresa Coty O'Neil	Project Editor for On the Ground Kalamazoo; English Instructor at South University Online; Freelance Writer
Anders Dahlberg Music Committee Chair	Director of Operations, Gilmore International Keyboard Festival
Pamela Enslin	Attorney and Partner, Warner Norcross + JuddLLP
Kathleen Jones	Vice President and Wealth Management Advisor, Fifth Third Private Bank
Josh Koets	Owner, JKDA Computer Solutions
Audrey Lipsey	Executive Director, Crescendo Academy of Music
Colleen McBride* Resource Development Chair	Consultant, CJ McBride Consulting for the Non-Profit Community
Greg Seiler	Vice President/Investments, Stifel
Naomi Siegel Morse	Community Volunteer
Kurt Voissem	Principal, Kurt Voissem & Associates (Great Lakes Business Solutions)
Margaret Hamilton* Executive Director	* Denotes members of the Strategic Planning Team



Planning Calendar

Date	Project Milestones	Participants
July 25, 2018	<u>Pre-Planning Meeting</u> <ul style="list-style-type: none"> Review planning process Prepare Planning Retreat #1 	Planning Team
October 12	<u>Strategic Planning Retreat #1</u> <ul style="list-style-type: none"> Draft mission and vision KSO collaboration Conduct trend analyses 	Board and Staff
November 6	<u>Follow-up Session</u> <ul style="list-style-type: none"> Create working draft of guiding principles Prepare Planning Retreat #2 	Planning Team
November 9	<u>Strategic Planning Retreat #2</u> <ul style="list-style-type: none"> Finalize mission and vision Decide on KSO collaboration Conduct S.W.O.T. and gap analyses Brainstorm strategies to close gaps Draft performance metrics 	Board and Staff
November 27	<u>Create the Strategic Plan #1</u> <ul style="list-style-type: none"> Develop goals, strategies, and action items 	Planning Team
December 5	<u>Create the Strategic Plan #2</u> <ul style="list-style-type: none"> Determine target completion dates and owners 	Planning Team
December 13	<u>Create the Strategic Plan #3</u> <ul style="list-style-type: none"> Review draft strategic plan against planning activities and make final adjustments 	Planning Team
	Dams & Associates submits final draft	
	Board reviews and approves new Strategic Plan	

Definitions

Goal

A measurable statement directly contributing to the vision that is observable and measurable. Goals describe the *future state* that will be achieved if all strategies underneath a goal are successfully implemented (“mini-vision”). It does not describe an action.

Strategy

An action statement that contributes to achieving the goal within a specified target completion date and by a specified owner. Each goal will have multiple strategies.

A strategy specifies the result of the action – an observable *deliverable* (e.g., a plan, process, procedure, statement, report, draft, equipment, facility, etc.).

Tactic

A tactic helps achieve a strategy. Not every strategy requires tactics. Tactics may have their own target completion dates and owners that may or may not differ from the target completion dates for the strategy.

Measure of Success

A description of how the organization will gauge high-level success for the mission, vision, and strategic goals. The measure of success does not include a target or direction.

Target

A desired numerical value needed to be achieved for a given measure of success.

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