**Vision**

A choral community that celebrates and connects people through the power of music that inspires, uplifts, and educates

**Mission**

Perform diverse musical masterworks, showcase new compositions and talent and move people out of their ordinary

**Deliverables**

1. Vision & Mission [complete]
2. Strategy
   1. Performance (venues, vocal quality standards, frequency, small groups)
   2. Community Engagement & Partnerships
   3. Fundraising (grants, sponsors, ticket sales, donations)
   4. Communication (social media, advertisement, email)
   5. Infrastructure (brick & mortar, singers, board of directors, volunteers)
3. Organizational Design
   1. Board of Directors (membership, succession planning)
   2. Chorus Leadership (Artistic Director)
   3. Chorus Committees & Volunteers
   4. Employees
4. Roles & Responsibilities
   1. Board of Directors (membership, succession planning)
   2. Chorus Leadership
   3. Chorus Committees & Volunteers
   4. Employees
5. Tactical Plan and Timeline
6. 5-year plan (goals, key performance indicators, and budget)

**Strategy Summary**

**Chorus Performance**

* HMC has approximately 60 chorus members with a target of 60-80 and no more than 120 based on costly venue constraints. The Artistic Director will define and move the chorus singing quality to a higher standard.
* Chorus will have opportunities to perform as one group and in smaller groups (themes) at a variety of venues such as churches, art galleries, museums, dance studios, hospitals, Houston events (Uptown Park Lighting ceremony, festivals), food bank, non-profit galas, airports, schools, Houston underground cistern, painted churches, amphitheaters (Round Top, San Antonio), prisons, and businesses (Mattress Mack)

**Community Engagement & Partnerships**

*Developing community starts first within the chorus and then moves outward*

* New partnerships may be paired with new venues and other music types such as opera, dance organizations (dancing while HMC singing), poetry readings, and art organizations (painting while HMC singing)
* Participate in Houston events such as ethnic festivals (Italian, Greek) and launch own HMC bi-annual music festival
* Focus on underprivileged and educational organizations by creating a competition for students to sing with HMC (solo part) and a choral program with Worthing High School. Partner with private, public, and home-schooled choruses that are good but not yet at their best
* Partner with big businesses, sporting clubs/organization, and open the events (ExxonMobil, Rockets, Houston Rodeo, George Brown events)

**Fundraising**

* Fundraising can start with the small actionable items such as having the chorus register HMC for their Amazon Smile, Kroger charities as well as submitting for company matching gifts
* BOD can focus on reconnecting with former sponsors, asking vendors (HMC accountant) for sponsorship as well as other business who have a stake in the Houston community
* All chorus/BOD can promote HMC on Facebook with fundraiser
* Host HMC Gala or “meet the Artistic Director and HMC Board” event
* Pursue grant writing on the local, state, federal, and foundation levels with a compelling story

**Communication (Internal & External)**

***Internal***

* Host a “communing” time [5:30 – 6:30 pm] before chorus practice
* Leverage and empower chorus to (1) fundraise and pay dues, (2) get people in the seats, (3) volunteer/donate their time, (4) provide leads for partnerships, and (5) learn and improve on their performance, (6) be an ambassador for HMC
* BOD interacts with chorus through Cadence messages and attendance at practices

***External***

* Develop a compelling STORY that has community impact and sells HMC
* Use social media to build brand and following, announce events, develop partnerships, etc. (Facebook, LinkedIn)
* Continuous thanks to sponsors and donors such as thank you cards, coffee conversations with BOD members, and pre- or post-event party with Artistic Director/BOD members

**Infrastructure**

* No consensus whether a brick and mortar office would be necessary to advance the vision and mission of HMC
* Hire a new development director (new position)
* BOD – 7 min, 15 max
  + Chairman -bylaw required
  + Vice Chair
  + Treasurer - bylaw required
  + Marketing
  + Communication [part of PR]
  + Development [part of PR]
  + Artistic Director – non-voting
  + Chorus President
  + Past Chorus President
  + Executive Director – non-voting
  + Secretary – bylaw required
  + Legal
  + Brick & Mortar Liaison
* Chorus
  + President
  + Vice President
  + Volunteer Coordinator
* Contract Services
  + Photographer
  + Website
  + Videographer
* Develop chorus as a community through shared activities keeping chorus size between 60 and 80 members

**Organizational Design & Succession**

**Board of Directors**

* The BOD ideally will be comprised of a minimum of 15 positions
  + Chairman -bylaw required
  + Vice Chair
  + Treasurer - bylaw required
  + Marketing
  + Communication [part of PR]
  + Development [part of PR]
  + Artistic Director – non-voting
  + Chorus President
  + Past Chorus President
  + Executive Director – non-voting
  + Secretary – bylaw required
  + Legal
  + Brick & Mortar Liaison
  + Nominating Chair & Bylaws
  + Former Chair – Member at Large
* Each position will be for a minimum of 2 years with a renewable clause
* Vice President will be the incumbent Chair after the Chairman’s term ends and the Chairman will become a Member at Large.
* The BOD also has committees that include:
  + Budget Committee:
    - Treasurer
    - Artistic Director
    - Executive Director
    - Member at Large

**Chorus Leadership**

Comprised of the (1) Artistic Director, (2) President, (3) Vice President (new position), and (4) Volunteer Director

* Artistic Director (indefinite term)
  + Vetted and hired by the BOD with input from the chorus
* Chorus President (2-year term)
  + Nominated by the chorus
  + Vetted and endorsed by the BOD
  + Voted on by the chorus
* Vice President (1/2-year term prior to Chorus President leaving term)
  + Nominated by the chorus
  + Vetted and endorsed by the BOD
  + Voted on by the chorus
* Volunteer Director (2-year term)
  + Solicited and selected by the Artistic Director

**Chorus**

Ideally the chorus will be 60-80 members with key positions of (1) Chorus Treasurer, (2) Volunteers, and (3) Section Leaders.

* Chorus Treasurer (2-year term)
  + Nominated by the chorus
  + Vetted and endorsed by the BOD
  + Voted on by the chorus
* Section Leaders (SATB) (no term length)
  + Picked by Artistic Director
* Volunteers (1-year term)
  + Positions: Chorus Manager, Social Committee, Trip Coordinator, Wardrobe, Social Media
  + Selected by the Chorus President except for Trip Coordinator which is selected by Chorus Treasurer

**Employees**

Part- or fulltime employees would include:

* Executive Director – Hired by BOD
* Administrator – Hired by BOD
* Accompanist – Hired by Artistic Director
* Development Director – Hired by BOD

**Services (Paid or Volunteer)**

Varies services and activities will not be part of the roles and responsibilities of the organizational design but will be procured through paid or volunteer people.

* Photo/video
* Web/Graphic design
* Event coordination
* Program advertisement

**Roles & Responsibilities**

**Board of Directors**

* **Chairman:**
* Oversee the decisions and implementation of all HMC activities
* Appoint chairs for all standing Board committees
* Hold regular meetings with Executive Director and/or Artistic Director, as needed
* Participate in fundraising activities, meeting, and presentations
* Attend chorus rehearsals on quarterly basis and brief chorus on noteworthy developments
* Assign responsibilities for new projects to appropriate board members as they arise
* Ensure current strategy and tactical plans align with HMC’s vision and mission
* **Former Chair:**
* Attend board meetings and provide support to current Chair
* Ensure that all board members have made donation by third Board meeting each year
* Participate as a member of the Budget Committee when formed
* **Vice Chair:**
* Prepare to assume the position of Chair, upon Board approval
* Conduct Chair responsibilities in absence of Chair
* Assist Chair in duties when required
* **Treasurer:**
* Demonstrates competency in QuickBooks
* Make deposits as needed
* Pay bills in a timely manner including the Board insurance
* Prepare monthly P&L and Balance Sheet
* Help prepare the annual budget
* Coordinate with HMC accountant as needed
* Keep the Board apprised of any significant changes in finances
* **Marketing:**
* Develop a long-term marketing plan in conjunction with Artistic Director and Executive Director
* Supervise marketing for individual concerts and fundraising
* Focus on expanding concert audiences
* Focus on expanding lists of current and prospective donors
* **Communication:**
* Improve and augment profile of HMC in the community
* Work with Marketing Chair and Executive Director to create communication plans for the season and individual events
* **Development:** See *Employee* responsibilities
* **Artistic Director:** See *Chorus Leadership* responsibilities
* **Chorus President:** See *Chorus Leadership* responsibilities
* **Past Chorus President:** Serve as continuity on the board
* **Executive Director:** See *Employee* responsibilities
* **Secretary:**
* Keep minutes of Board meetings and distribute before next meeting
* Ensure all notices are given in accordance with Bylaws
* Act as custodian of corporate records
* **Legal:**
* Provide input for legal matters affecting HMC
* Draft and/or provide advice on HMC contracts
* **Brick & Mortar Liaison:**
* Provide board with input on matters affecting rehearsal and performance locations
* Maintain and nurture positive relationship with practice and concert venue representatives
* **Board Nominations & Bylaws:**
* Determine profile of appropriate new board members
* Supervise candidate searches
* Supervise vetting of candidates and submit Chairman
* **Former Chair as Member at Large:** Serve as continuity on the board
* **Budget Committee**
* Provide financial oversight for the organization including budgeting, financial planning, and reporting
* Collaborate with the Artistic Director in developing and recommending to the BOD a program and annual operating budget
* Adhere to the budget
* Set long-range financial goals along with funding strategies to achieve them
* Present all financial goals and proposals to the BOD for approval

**Chorus Leadership**

* **Artistic Director:**

***Artistic Management/Conducting***

* Provide recommendations for HMC Board approval of all artistic aspects in the choice of repertoire and selection of venues. Repertoire should reflect strong interest in outreach and education by partnering with non-traditional groups and under-served communities and include new music, partners, audiences, and venues.
* Advise Executive Director in selection of appropriate rehearsal and performance venues.
* Develop, in collaboration with the Programming Committee, a three-year music program calendar of major works for HMC and chorus tours.
* Provide exact musical score requirements (title, composer, publisher, and edition) one month prior to each concert cycle as the Chorus provides their own scores.
* Prepare scores for chorus, orchestra, and soloists.
* Demonstrate well-established, efficient, and advanced skills in rehearsal technique, balancing attention to technical details, overall interpretive goals, and scheduling practicalities.
* Supervise all recording activities.
* Form an auditioned chamber group from the chorus of singers committed to several extra performances for donor and audience-building functions.

***Audition and Rehearsal***

* Hold auditions for new singers at least twice a year or as appropriate.
* Audition the full chorus every 2-3 years according to the policies of the audition committee.
* Plan sectional rehearsals and assigns section directors as needed.
* Hold weekly rehearsals on Monday evenings during the season.

***Concerts***

* Select all artistic personnel (soloists, instrumentalists) within budget limitations.
* Produce concert programs and program notes for each concert with Executive Director and Marketing Committee.
* Coordinate with the Stage Manager and Executive Director on all matters regarding Chorus performance placement.

***Administrative/Board Relations***

* Regularly attend committee meetings and presents reports to the Board of Directors regarding the status of the artistic programs and projects.
* Work collaboratively with executive and program directors and staff.
* Inspire creativity and offers new ideas and directions that reflect Houston’s diversity.

***Public Relations***

* Participate in community activities that further the name recognition of the Chorus.
* Represent well the Chorus in media appearances upon request.
* Establish goals and builds community partnerships that lead to an expanded audience.

***Financial Management***

* Develop, in collaboration with the Executive Director, a comprehensive artistic plan and specific repertoire by January 1st for the following concert season. Such plan will provide the basis for the annual budget, as well as serve the marketing and grant efforts.
* Operate within fiscal budgets and constraints.
* Participate in fundraising activities as requested.
* **Chorus President:**
* Serve as the primary liaison between the Chorus and the BOD
* Implement that strategic plan approval by the BOD
* Collaborate with the Artistic Director to organize outreach activities to enhance audience and member development
* Maintain current roster of chorus members and dues status
* **Chorus Vice President:**
* Prepares to transition to Chorus President after appointed term
* Fulfills the role of the Chorus President when absent
* **Volunteer Director:**
* Leads and manages all volunteers and committee leaders
* Solicits and vets volunteers to fill needed volunteer roles

**Chorus**

* **Chorus:**
* Attend and be punctual for all rehearsals and concerts during the season
* Practice to deliver the best vocal performance
* Pay annual dues
* Read Chorus Cadence to stay up to date on current news
* Purchase all music and wardrobe items on a timely basis
* Promote HMC for tickets sales, sponsorships, and membership
* Always adhere to the HMC Code of Conduct
* Be a positive representative of the organization
* **Chorus Treasurer:**
* Take payments at rehearsals for all items (tickets, dues, wardrobe, etc.)
* **Section Leaders:**
* Assist the Director in musical matters including note and vocal problems within the section and ensuring that absentees receive markings given in missed rehearsals.
* Assist the chorus manager by keeping the section informed of schedule changes.
* Assist the Director in identifying sectional vocal, musical, discipline or other problems that have not been addressed.
* Work in conjunction with other sections leaders.
* Be a skilled musician who can read music well (piano skills useful).
* Organize and lead sectional rehearsals in the pursuit of artistic excellence, striving for section artistic growth.
* Provide coaching and encouragement for singer in the section and new members.
* Be able to lead sectional rehearsals as part of regular rehearsals
* Foster a dedicated and friendly atmosphere in the Houston Masterworks Chorus by assisting members who are having musical difficulties or who don’t understand choir procedures and traditions and asks questions during rehearsals.
* During rehearsals, section leaders are the only ones allowed to make comments or ask questions. Singers are asked to give any questions or comments to their section leader, who will forward to the Director.
* **Volunteers:**
* **Chorus Manager:**
  + Manage pre- and post-concert logistics for chorus and orchestra
  + Based on coordinate with AD and venue, provide instructions on chorus dress code, arrive and departure, gathering for all, arranging risers, organizing delivery and pickup
* **Social Committee:**
  + Coordinate after rehearsal venues for chorus gatherings.
  + Organize special events such as year party
* **Trip Coordinator:**
  + Coordinate with vendor
  + Execute logistics to assure safe and successful trip
* **Wardrobe:**
  + Assure every new member understand the chorus dress code
  + Contract for best price women’s concert dress, measures to fit orders, delivers on time
* **Social Media:**
  + Execute board approved marketing plan
  + Coordinate with ED and Marketing Chari to place announcements in selected markets

**Employees**

* **Executive Director:**

***Board of Directors***

* Work collaboratively with the BOD and its officers to help them fulfill their functions
* Assist the Chair in developing and processing agenda for the Executive Committee and board meetings
* Collect and distribute reports for presentation to the Executive Committee and HMC BOD, maintains organizational documents
* In absence of Board Secretary, records minutes in standard minute form and make available to the BOD for review within one week

***Development Team***

* Maintain HMC CRM, train volunteers to assist as needed
* Assist in year-end campaign. Work with CRM team to track donations, analyze and report results to HMC BOD. Assist with donor thank-you letters as requested
* Assist grant writer/team with foundation and government grant requests and reports

***Marketing and Communications Team***

* Assist Marketing and/or Communication committee win developing, coordinating, and executing their initiatives and programs and report to the HMC BOD approximately 6 weeks after concert on the efficacy of marketing efforts
* Perform publicity, public relations, event marketing, advertising, performance programs as needed
* Act as spokesperson for the chorus to the media, government agencies, corporate community, foundations, philanthropists, and the school communities
* Assist Chorus Cadence newsletter volunteer team with content management and distribution, website development and updates as needed

***Volunteer Development and Management***

* Manage all aspects of concert house operations; act as liaison to venue staff and specialized personnel such as photographer, videographer and front of house volunteers for ticket sales, subscriptions, social and cleanup

***Financial Management***

* Work with Artistic Director and Board Treasurer to prepare budgets and manage financial operations in accordance with approved budget and governmental regulations
* Determine with Artistic Director the upcoming season for performance and administrative costs
* Notify Treasure of estimated costs so Treasurer may prepare budget for presentation to the BOD
* Signatory on the HMC checking account
* **Administrator:**

***As Executive Assistant (50%)***

* Provide daily administrative support for the Artistic Director and coordinate independent projects (workshop engagements, festivals, clinics)
* Make travel arrangements (air, hotel, ground transportation) for trips, conferences, and festivals
* Communicate with external organizations to confirm speaking schedule, coordinate materials, and expense reimbursement
* Provide occasional administrative support to Executive Director

***As Operations Manager (25%)***

* Serve as the chief liaison to all concert venues and as production manager for all concerts and tours
* Coordinate the administration of the HMC Singers, working with the Chorus President, volunteers and singers to carry out the day-to-day activities including rehearsals, attendance, music distribution, auditions, wardrobe, and other management items
* Plan and execute all tours and run-outs, with the direction of the Executive Director
* Arrange guest artist travel and arrangements, including itineraries, visas, work permits and lodging

***As Office Manager and Board Liaison (25%)***

* Manage communication and master calendar for the Board of Directors and staff
* Oversee vendor contracts
* **Accompanist:**
  + Be proficient at reading open score, including only selected choral parts, and have the
  + ability in playing parts even when no piano reduction is provided.
  + Be a fine musician who can contribute a further dimension of artistry and
  + excellence to both rehearsal and performance.
  + Be proficient in providing the piano/organ/keyboard accompaniment when there is a separate piano part and the vocal parts
  + Learn to anticipate the conductor’s actions and reaction and point of the return and restart during rehearsals
  + Be capable of improvisation
  + Be able to lead sectional rehearsals as needed
  + Ability to play everything from Gershwin to Bach
  + Sight-reading skills
  + Performs at all concerts as scheduled by the Director
  + Positive and encouraging demeanor to singers and organization
* **Development Director**

***Leadership and Development Strategy***

* Manage and execute HMC’s development plans to achieve annual revenue goals
* Update existing development plans with new ideas, industry best practices, and data-driven analysis
* Ensure a robust gift pipeline big enough to hit annual revenue goals by actively managing prospective and current donors, foundations and other funders solicited via proposals, grant applications, multiple appeals, and other fundraising activities
* Participate in strategic planning for HMC to ensure development plans align with and are in service of evolving organizational goals

***Fundraising and Donor Relations***

* Manage and develop existing initiatives, appeals, and campaigns focused on targeting new donors and stewarding existing donors
* Serve as the primary POC for all small and mid-size donors
* Help develop creative and mission-focused fundraising messaging that effectively articulates the special role and impact of HMC in the community
* Project-manage the ED’s fundraising work, directing them where and how best to spend their time and efforts.

***Managing Grant Opportunities***

* Conduct prospect research to ensure HMC has a robust pipeline of local, regional, and national grant opportunities to pursue
* Create and manage a grant calendar to track all upcoming applications and reports, collaborating with staff as needed
* Clearly and effectively draft dynamic, reader-friendly, and high-quality
* Track all grant work in CRM to ensure all grant opportunities and tasks are current and well-detailed

***Managing Development Operations and Revenue Tracking***

* Establish and monitor annual and long-term revenue goals and budgets
* Design and update a regular progress-to-goal report and development dashboard for the Executive Director
* Spearhead development-focused data input in CRM

***Overseeing Consistent and Creative Donor Stewardship***

* Think creatively about the donor stewardship plan and update it annually with new and meaningful ways to connect donors and foster a sense of community
* Collaborate with the Director of Marketing on the optimal design and content for a donor-focused annual report

**Action Items**

1. Re-audition chorus
2. Create standard for chorus membership and performance
3. Develop timeline on which to raise the singing quality
4. Commission a singing piece with Santa Fe High School by Joey Love
5. Commission Sam Jones
6. Create HMC music CD
7. Provide written instructions for chorus in how to select HMC as Amazon Smile and Kroger charity
8. Recontact former sponsors to ask for their support
9. Get chorus to participate in their own fundraising
10. Invite Mattress Mack to HMC concert
11. Conduct a BOD needs assessment
12. Change bylaws as necessary post acceptance of strategy, organizational design, and roles & responsibilities
    1. New chorus VP position
    2. 2 yr. vs. 3 yr. term
13. Waive annual dues for section leaders