



 SWEETWATER  
MUSIC FESTIVAL  
Classical/Jazz/Contemporary

Music that  
Inspires,  
Challenges,  
& Connects

Strategic  
Plan  
2018 - 2020

[sweetwatermusicfestival.ca](http://sweetwatermusicfestival.ca)

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**Report prepared by  
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# SweetWater Music Festival Strategic Plan 2018-2020

## Introduction

In 2016 the Board of Directors of the SweetWater Music Festival decided to develop a new Strategic Plan for the organization to provide concrete strategies and action plans for the festival and related activities.

Three key themes prompted the development of the Strategic Plan:

1. The organization had a new manager and new board members, as well as experienced board members, who saw the need for a shared plan that articulates the organization's vision, purpose, goals and actions. All agreed that a focused, supported plan for SweetWater was critical for the health of the organization.
2. SweetWater is now a mature organization, with a strong and successful 14-year history of annual festivals and events. Creating a new long-term plan to build on these successes, ensure sustainability, and support mature growth and development was a necessary step to begin the 15<sup>th</sup> year for SweetWater.
3. A review of the previous Strategic Plan (2012 – 2015) showed that goals for the 4 key 'Centres of Activity' (Revenue Development, Finance and Administration, Communication and Marketing, and Human Resources) were generally successfully, largely completed, or had surpassed targets. A new roadmap with explicit strategies and goals was needed.

## Development of the Strategic Plan

This Strategic Plan was developed through the volunteer contributions of board members with expertise in strategic planning. In addition, a community planning and organizational expert, Marilyn Struthers brought her considerable expertise to SweetWater, reviewing draft reports and facilitating a key strategy session as a volunteer. Thank you to everyone who brought their expertise and passion for SweetWater forward for the creation of the new strategic plan.

This development of the plan included input from board members, the Artistic Director and Festival Manager, past SweetWater volunteers and audience members, and key community supporters and stakeholders. Keith Medley provided important historical information, resources on planning processes for artistic organizations, and background for the review of the previous draft Strategic Plan. Two facilitated workshops with Board, staff and volunteers were completed to draft a vision statement, review the mission statement, develop values, and determine strategic directions. An electronic survey (Survey Monkey) was posted on the SweetWater website and sent electronically to supporters and stakeholders. The Board of Directors reviewed several draft plans in detail. Many thanks to Bruce Hutchinson and Jill Willington for their careful and detailed reviews of draft documents and for work on the workplan. The Board of Directors, at the November 2017 board meeting, approved the final Strategic Plan. Work plans for year one (in detail) and years two and three have been drafted, and will be living documents for the organization going forward.

The key elements that make up this Strategic Plan are:

- A new and targeted Vision Statement for SweetWater.
- A review and reworking of the SweetWater Mission Statement.
- New Value Statements that guide the work of organization.
- An articulated Governance structure for the organization, as well as new values to support the collaborative work of the Board, Artistic Director and Festival Manager.
- Five Strategic Directions for the next 3 years.
- Goals and Objectives for each of the Strategic Directions.
- A detailed Workplan for the first year of the plan.

## Organizational Profile

The SweetWater Music Festival began in 2003 and was founded by Jean and Keith Medley and Artistic Director Mark Fewer. It began as an experiment to bring an event unique to the Grey Bruce area that was done exclusively for the ‘joy of the experience’ (Mark Fewer). The weekend event at the Leith Church was so successful that plans were immediately made to hold it again in 2004.

What began as a small ‘event’ in 2003 has grown and matured over the past 14 years, and SweetWater is now an established and a premier cultural festival in the region and province. Although the organization has changed, from an event organized by a close-knit group of family and friends to an incorporated charitable organization with paid staff and a Board of Directors, there are some critical elements that have remained the same:

- As Sweetwater’s Artistic Director, Mark Fewer continues to provide dynamic and creative leadership and brings world-class musicians to the region. SweetWater continues to deeply connect with the community, and is supported by many long time volunteers, donors, sponsors and audience members.
- The festival has always operated financially at a breakeven level, with small surpluses and the occasional small deficit. The festival continues to grow and requires a greater financial cushion to protect against unexpected challenges.
- Audiences are enthusiastic, loyal, and have grown in number, doubling in the last 5 years.
- The music and performances are always unique, ground breaking, challenging, eclectic and world class.
- The festival brings musical excellence, experiences, and well-known performers to a rural region that is somewhat off the beaten track, and where such experiences rarely happen.
- SweetWater has a unique connection with luthiers from the region, and they are an important part of each festival.
- SweetWater reaches out to the community. It supports the development of musicians and audiences and provides access to exceptional musical experiences through school performances, free events, workshops and by engaging children and youth.

*“SweetWater manages to always surprise, challenge and delight me in some, or many ways.”  
(survey participant)*

Results of a survey conducted in 2017 as part of the Strategic Planning process highlighted that:

- ✓ The Artistic Programming was rated as 'excellent'
- ✓ The development of musicians was rated as 'good to excellent'
- ✓ More work needs to be done to build long-term sustainability in the area of finances and audience development.
- ✓ Over 80% of survey respondents rated the success of the organization as 'very successful or extremely successful'.
- ✓ Several potential barriers for the organizations future development were identified: long-term financial sustainability, lack of accommodation in Owen Sound for out of town patrons, under-represented younger audience members.

*“Maintain the fabulous calibre of performance and find more ways to promote it.”*  
(survey participant)

Some survey participants suggested: more marketing in and outside of the region, a long-term endowment strategy, and increased collaboration with schools and local music teachers.

## Governance

At the first Strategic Planning workshop the governance of SweetWater was reviewed and a governance structure from *An Elegant Process: The Artistic Process/The Planning Process*, N. McDaniel, G. Thorn, (2007), was adopted. Some key elements are discussed below and more information can be found in Appendix A.

### **Leadership**

At the centre of SweetWater is the vision of the Artistic Director, and everything at SweetWater begins with this vision. The work of the Board of Directors is to help the Artistic Director realize the artistic vision, while fulfilling its governance and legal requirements, its administrative and staffing responsibilities, and the financial obligations necessary to support and sustain programs and activities, and the overall sustainability of the organization.

The SweetWater governance model is a holistic series of concentric circles with the professional leadership and vision at the centre (artistic director, festival manager, board members). The other professionals, board members, volunteers, key donors/sponsors/funders, and artists who produce the festival are in the next ring, the pool of people (volunteers, donors, audiences, sponsors who are needed by the centre to fill organizational and artistic needs in the next ring), and the outside ring is made up of the people who fill short term needs for the organization, often on a one time basis. The concentric circles provide a model that requires strong relationships and communication, and planning that is built around the artistic vision and contribution to community.

The artistic vision of the Artistic Director is aligned with the mission, vision and values of SweetWater. It is the responsibility of the Board of Directors to communicate and collaborate with the Artistic Director, and ensure that the administrative, planning and funding needs of the organization are met.

## ***Governance Values***

As part of the discussion and adoption of a new governance structure, we developed a set of Values that support the way the people involved with SweetWater work together:

- We value collaboration and finding consensus to achieve our goals.
- Our work together is gratifying to all, positive, and inspiring.
- We are practical and grounded in what is possible, and stretch ourselves to create and experience new forms, models and ways of operating.
- We strive to have a 'heart and head' balance in all we do.
- We place the values of the organization, including the musical mandate at the core of our work. We address the social, economic and financial barriers in support of a rich, varied and shared experience of music and community
- We appreciate tangibly, the expertise, passion and commitment of everyone involved in SweetWater.
- We work in an inclusive and respectful way with all.

## Mission Statement for SweetWater Music Festival

A Mission Statement needs to explain the 'what' and 'who' of an organization including what we want to accomplish, and their goals, underlying philosophies and values.

Marilyn Struthers suggests that a good mission statement answers the following questions:

- You do this to accomplish what?
- What is the change that happens for individuals and community because you do this?
- What is the change in the musical ecosystem of our community because you do this?

The current mission statement for SweetWater is:

*“To bring unique and exciting musical experiences of the highest quality to inspire and engage people of all ages, backgrounds and localities through: an annual fall festival, a showcase of local luthiers, concerts throughout the year, mentoring and educational initiatives, and partnerships with other community organizations.”*

### *The New Mission Statement for SweetWater*

***A showcase for the world’s best performers,  
providing audiences with unique, intimate, and cutting-edge musical experiences  
that engage the mind, the spirit and the community***

## SweetWater's Vision

SweetWater developed a vision statement as part of the Strategic Planning process.

A Vision Statement describes where an organization is headed and keeps an organization moving forward, against all odds. It asks the question: What is our preferred future? It keeps discussion and decision-making focused on the aims of the organization, as opposed to the aims of individuals within the organization.

### *A New Vision Statement for SweetWater*

***SweetWater – Music that inspires, challenges and connects***

## SweetWater Values

SweetWater developed Value Statements as part of the Strategic Planning process.

Value statements provide guidelines for how people will work together and set out the ways the organization will choose among competing priorities. People within the organization need to know about the existence of values, support them, and demonstrate these values in their work with one another and for the organization.

## *New SweetWater Values*

- **Deep listening and emotionally rich music experiences**  
**SweetWater** challenges, engages and touches listeners and performers and offers emotionally rich experiences. SweetWater is synonymous with quality and meaningful concert going.
- **Service to the community**  
**SweetWater** is a sustainable organization that provides service to the community by enriching lives through live music, developing musicians and luthiers, providing volunteer and mentoring opportunities, building audiences and contributing to the financial and cultural richness of the region.
- **Building audiences**  
**SweetWater** develops and builds audiences for creative and original music and performances from classical, jazz and contemporary traditions. It inspires and challenges audiences from all walks of life with breakthrough musical experiences that are inclusive and accessible.
- **Building bridges and connections**  
**SweetWater** builds bridges and connections between musicians, creators, mentors, learners, luthiers and audiences of all ages and backgrounds. SweetWater connects local people with people from beyond our regional borders to build personal and community relationships.
- **Building the future**  
**SweetWater** looks to the future and provides educational and mentoring opportunities for musicians, composers and luthiers that are hard to access in a rural community.
- **Inclusion and access**  
**SweetWater** strives to make performances and musical experiences inclusive and accessible for marginalized individuals and groups in the region, promotes concerts and events widely to invite the whole community to be part of SweetWater, and works to make events physically accessible for persons with disabilities.
- **Collaboration and partnerships**  
**SweetWater** collaborates and partners with other arts and music organizations, educational institutions and funders on joint projects to promote arts and music broadly in the region.

## **Strategic Directions**

The Strategic Directions for this plan were developed at a workplan session facilitated by Marilyn Struthers. Five Strategic Directions were identified as priorities for the organization. The Chart below is a high level summary of the Strategic Directions, the organizational Values that support each direction and some Expected Outcomes.

## Summary of Strategic Directions, Operationalizing Values and Expected Outcomes

Strategic Direction	Value(s)	Some Expected Outcomes
<b>1. Succession Planning</b>	<p><b>Service to the community</b></p> <p><b>Deep listening and music experiences</b></p>	<p>Board members from outside of our region</p> <p>Board expertise needed for SweetWater secured</p> <p>Volunteer opportunities</p> <p>Civic leadership opportunities</p> <p>Supported and valued Artistic Director</p> <p>Supported and valued Festival Manager</p> <p>Artistic Director Succession Plan in place</p> <p>Festival Manager Succession Plan in place</p>
<b>2. Audience Development</b>	<p><b>Building audiences for creative and original music.</b></p> <p><b>Deep listening and music experiences</b></p> <p><b>Building bridges and connections</b> between musicians, learners, luthiers and audiences.</p> <p><b>Inclusion and Access</b></p>	<p>Audience returns to the festival – loyalty.</p> <p>SweetWater audiences come from our region and beyond:</p> <ul style="list-style-type: none"> <li>• What is the ratio now?</li> <li>• What is our target and why?</li> <li>• Number of tickets sold</li> <li>• Collect data on where patrons come from</li> </ul> <p>Artists and audience interaction and connection motivate and bring top tier artists.</p> <p>Audience members are donors</p> <p>Audience expects and anticipates new musical experience - Audience opens ears and minds</p> <p>Emotional experience, memory and social connection</p> <p>Artists come here to play because of engaged audiences, deep listening.</p> <p>Audiences and performers are local and come from beyond the region.</p>
<b>3. Music for the Future</b>	<p><b>Service to the community</b></p> <p><b>Building audiences for creative and original music.</b></p> <p><b>Building the future</b> with educational and mentoring</p> <p><b>Inclusion and access</b></p> <p><b>Collaboration and Partnerships</b></p>	<p>Local and young musicians have access to top performers and teachers (Classical, Munchkins, master classes)</p> <p>Mentoring of upcoming young musicians and artistic directors</p> <p>Local musicians as performers at SweetWater</p> <p>Support for youth orchestra and local musician development</p> <p>Local performers/luthiers come from our region as well as, national and international performers</p> <ul style="list-style-type: none"> <li>• What is the ratio now?</li> <li>• What is the target?</li> <li>• Collect data</li> </ul>
<b>4. Partnerships and Collaboration</b>	<p><b>Collaboration and partnerships</b></p> <p><b>Building the future</b></p> <p><b>Building bridges and connections</b></p> <p><b>Inclusion and access</b></p>	<p>Arts organizations work together to build a cultural ‘eco system’</p> <p>Partnerships with local arts organizations</p> <p>Partnerships with arts organizations outside the region (Festival of the Sound, etc.)</p> <p>Shared marketing and promotion</p> <p>Joint ventures</p>
<b>5. Financial Sustainability</b>	<p><b>Service to the community</b></p> <p><b>Building bridges and connections</b></p>	<p>Luthiers have higher sales/increased sales</p> <p>Recordings of festival performances sold</p> <p>Economic contributions to local businesses</p> <p>Owen Sound, Meaford, Grey Bruce recognized for cultural/musical excellence</p> <p>Creating measureable economic impact</p>

## *Strategic Directions and Goals*

### **1. Succession Planning**

#### **Goals**

- a) Artistic Director – succession plan that reflects the true value of the AD’s work
- b) AD recruiting plan
- c) Implement market value remuneration package (financial implications, reporting and fundraising impact)
- d) Transition considerations: phase-in, artistic continuity, communication
- e) Board committee member acquisition – increase number of committee members and even volunteers
- f) Board succession planning – after a needs assessment, recruit diverse Board members and plan for vacancies
- g) Festival Manager contract and fees – conduct performance analysis, fee review in 2018 and contract renewal in 2019
- h) Volunteer acquisition and support – develop a volunteer plan for annual festivals.

### **2. Audience Development**

#### **Goals**

- a) Enlarge local audience and audience from outside the region at all SweetWater events
- b) Market SweetWater to increase audience diversity and numbers
- c) Educate and engage young people about SweetWater, concert going and their musical listening development.

### **3. Music for the Future**

#### **Goals**

- a) Expand the mentorship role of SweetWater in terms of music career development in a number of fields and in concert entrepreneurship
- b) Fund new works and musical forms, across all ethnicities
- c) Musical development for emerging musicians

### **3. Partnerships and Collaboration**

#### **Goals**

- a) Connect with like organizations (for example GBS, Georgian Bay Concert Choir, Leith Summer Music, Donna Steinacher Scholarship and other cultural institutions such as the Tom Thomson Gallery (TOM))
- b) Connect with like organizations outside of the region
- c) Use synergies to promote and support the development of classical/jazz/contemporary music in Grey Bruce, with young musicians and music in schools.

## 4. Financial Sustainability

### Goals

- a) Work toward the financial benchmarks that provide a sustainable organization over the three year plan:  
**Revenues:** 33% Tickets, 33% Sponsors, 34% Grants and Fundraising  
**Expenditures:** 45% Artistic, 15% Production, 10% Education, 10% Marketing, 15% Administration, 5% Contingency.
- b) Develop an Endowment structure to provide for long-term financial sustainability, and develop a plan to secure funds.
- c) Improve and enhance luthiers' economic success as partners at SweetWater by consulting with them and researching possibilities.

## Conclusion

This new Strategic Plan, with direction set by a new Mission, Vision, Values and Strategic Directions, as well as concrete goals outlined in this document will provide a way forward for the SweetWater Music Festival over the next three years.

The plan is comprehensive and far reaching and practical. It is built on the firm foundation of learning and successes that SweetWater has garnered over the years, as well as the expertise and passion of the leadership and supporters of this amazing festival.

Detailed Workplans for each year of this Strategic Plan will be prepared and presented to the Board of Directors by the standing Board Committees: Education, Marketing and Promotion, Hospitality as well as by the Artistic Director and Festival Manager.

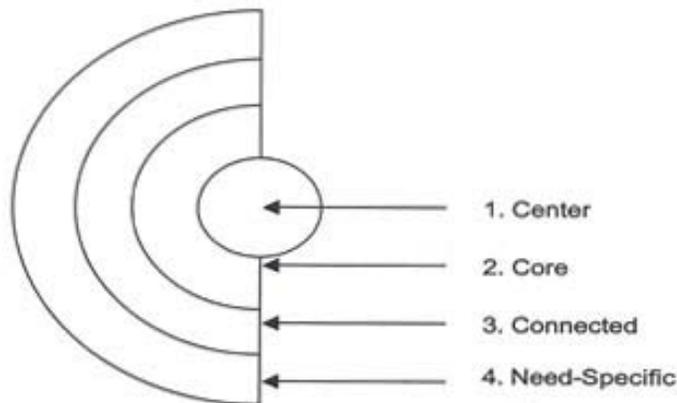
We are confident that SweetWater will continue to grow and mature as a sustainable and unique music festival that in the words of Mark Fewer 'inspires our local community, strives for excellence and positions the arts as a central part of the human experience'.

Many thanks to everyone who has contributed to this Strategic Plan in so many ways over the past months. We look forward to the continued support of SweetWater volunteers, artists, donors, sponsors, supporters and audiences as we move forward.

A Strategic Plan is a living document. The Board of Directors welcomes your on-going input and feedback as we realize this plan over the next three years. You can send your thoughts and ideas to us by way of the SweetWater website or social media.

## Appendices

### Appendix A – Governance Model for SweetWater



**The Center.** At the center of an arts organization is the professional leadership and the vision. This diagram refers to the professional leadership, however it is defined. It may be a single leader or two or more collaborating partners.

**The Core.** Around the center is a group of artists, designers or other professionals who are closely involved in creating, producing and supporting the work. This core may be made up of two, three or more. The core is made of those with whom the center has most intense working relationship. There is a very high level of trust between the center and core.

**The Connected.** The connected circle includes those professionals who have an ongoing relationship with the center, but on a project basis. They comprise the pool of people the center draws from to fill artistic or organizational needs outside the core.

**The Need-Specific.** The need-specific circle represents those artistic, technical and administrative professionals who fulfill one-time needs. Their skills and talents are not available in the core or connected, and there is no intention on either part to develop a long-term relationship.

Again, the specific character of the above relationships and working processes will vary from organization to organization. But the nature of these

Source: *An Elegant Process: The Artistic Process/The Planning Process*, N. McDaniel, G. Thorn, (2007)

Appendix B – Revenues and Expenses 2017



- Figures below are based on the 2017 Budget approved by the Board of Directors

