



SWEETWATER MUSIC FESTIVAL

STRATEGIC PLAN
2021-2023

 SWEETWATER
MUSIC FESTIVAL
Classical/Jazz/Contemporary

SweetWater Music Festival

Strategic Plan 2021 – 2023

Prepared By

Colleen Purdon and Charlotte MacFarlane

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Many people contributed to the development and completion of the 2021-2023 Strategic Plan. SweetWater is grateful for their expertise, their input and their time. It is clear that the people who were engaged in the Strategic Planning project care deeply about the future of SweetWater and value the contributions that the organization makes to musicians, culture and community.

On behalf of the SweetWater Music Festival, we would like to express our thanks and appreciation to all of the participants during the information gathering process, the data analysis, the development of strategies, goals, and actions, and the writing of this Strategic Plan. In particular, we would like to thank stakeholders from a wide range of organizations who participated in thoughtful and rich interviews about the music industry and the challenges and opportunities that face festivals, music organizations and performers. A special thank you to Mark Fewer and James Campbell for providing such clear and compelling direction based on their knowledge and long history with SweetWater, and as outstanding music festival leaders.

A big thank you to the members of the SweetWater Board of Directors, and Co-Chairs Lynda Montgomery and Jill Willington, for their enthusiastic input at several workshops to chart a course forward for SweetWater. Retired Board members and SWMF supporters from the early days, Ewan and Cynthia Porter, and Judy and Ken Thompson, provided input at the beginning of the plan development. Marilyn Struthers, volunteered once again to lead the Board through a Zoom workshop to develop outcomes and actions for the plan. We are grateful for her facilitation skills, her input on strategic planning in general, and her support of SweetWater.

Thank you to Paul Eichhorn, our General Manager, and Edwin Huizinga, SweetWater's Artistic Director, for their knowledgeable and committed participation in the Strategic Planning process from the beginning.

This Strategic Plan was researched and written by Charlotte MacFarlane and Colleen Purdon, Board members with SweetWater. Charlotte's daughter Hannah MacFarlane volunteered her time to contribute the graphic design elements.

Introduction

The SweetWater Board of Directors began a discussion on the development of a new Strategic Plan for 2021–2023 in late 2019. Board members agreed that the 2018-2020 Strategic Plan was a helpful tool for the organization, and it needed to be updated. They decided that the new Vision statement, Mission statement and Values statements did not need to be revisited, but that a proper SWOT Analysis (an assessment of Internal Strengths and Weaknesses, as well as external Opportunities and Threats) was needed. No major new challenges or risks were on the horizon, so the new plan would update the current strategies, goals and activities based on information from the SWOT Analysis. Two Board members volunteered to complete the new plan and have it ready for Board approval and implementation by January 2021.

In February 2020 everything changed. The COVID 19 pandemic and subsequent lockdowns, protocols, and restrictions impacted all aspects of day-to-day life in our community, our province, our country and around the world. Nothing was predictable and everything changed. The COVID 19 pandemic had a profound impact on workplaces, the economy, musicians, the arts and culture industry, and our community. The development of a Strategic Plan during a worldwide pandemic was no longer a matter of tinkering around the edges or updating the old plan. SweetWater was forced to completely rethink how to fulfill its Mission and Vision and bring music and musicians to our community within the ever-changing pandemic landscape.

The two Board members who volunteered to do a ‘quick update’ in the fall of 2019, who are the authors of this report, embarked on a very different process to develop the 2021-2023 plan outlined in this document. It is the result of a much more comprehensive approach to the SWOT analysis, research and consultation. We were fortunate to have a great deal of help along the way from Board members, industry peers and leaders, our Artistic Director and General Manager, and finally a volunteer facilitator, Marilyn Struthers, who helped us ‘harvest’ our learning from the SweetWater Surreal pandemic response and establish key outcomes for this plan. Thank you!

‘The keys to successful strategic plan implementation are inclusiveness, trust, delegation, a safe environment for discussion, simple terminology, and a big communication toolbox to continually reinforce the Vision and ideas of the plan.’ (Manual of Strategic Planning for Cultural Organizations - 2017)

The development of the 2021-2023 Strategic Plan focused on key questions: What are the requirements for success in this environment? What have we learned as an organization because of the pandemic? How can SweetWater continue as an enriching, contributing, and a vibrant arts organization for artists and our community?

This plan is a living document to support a uniquely creative and resilient organization managing truly uncertain times.

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). What began as a small event in 2003 has grown and matured over the past 18 years. SweetWater is now an established, high caliber cultural festival in the region and province, well known for the excellence of its performers, its innovative and unique programming and its intimate performances.

In 2019 the founding Artistic Director Mark Fewer left SweetWater to become the Artistic Director of the Stratford Summer Music Festival. Mark remains committed to the success of SweetWater and provided the Board with his time and support for the search and hiring of a new Artistic Director. There were many enthusiastic applicants for the job, a testament to the high regard that musicians have for the festival. SweetWater was delighted to name Edwin Huizinga as the new AD at the 2019 SweetWater Festival. Edwin had performed often at the Festival and knows the community well. He had planned an outstanding debut festival for 2020 that was upended because of the COVID 19 pandemic. Edwin then worked closely with the General Manager, Paul Eichhorn, and the Board to bring *SweetWater Surreal 2020* to audiences throughout the region. For the first time, all performances were outdoors, in beautiful natural settings and gardens. Luthiers from the area showcased their instruments at the Owen Sound Market, and pop-up concerts happened in parks, on the waterfront and at street venues. SweetWater was able to provide amazing music and engage the community at a time when many organizations cancelled their programs. It was clear that during the pandemic people needed live music and performances more than ever. SweetWater also turned to live stream and digital performances to make the music and musicians accessible during the COVID lockdowns.

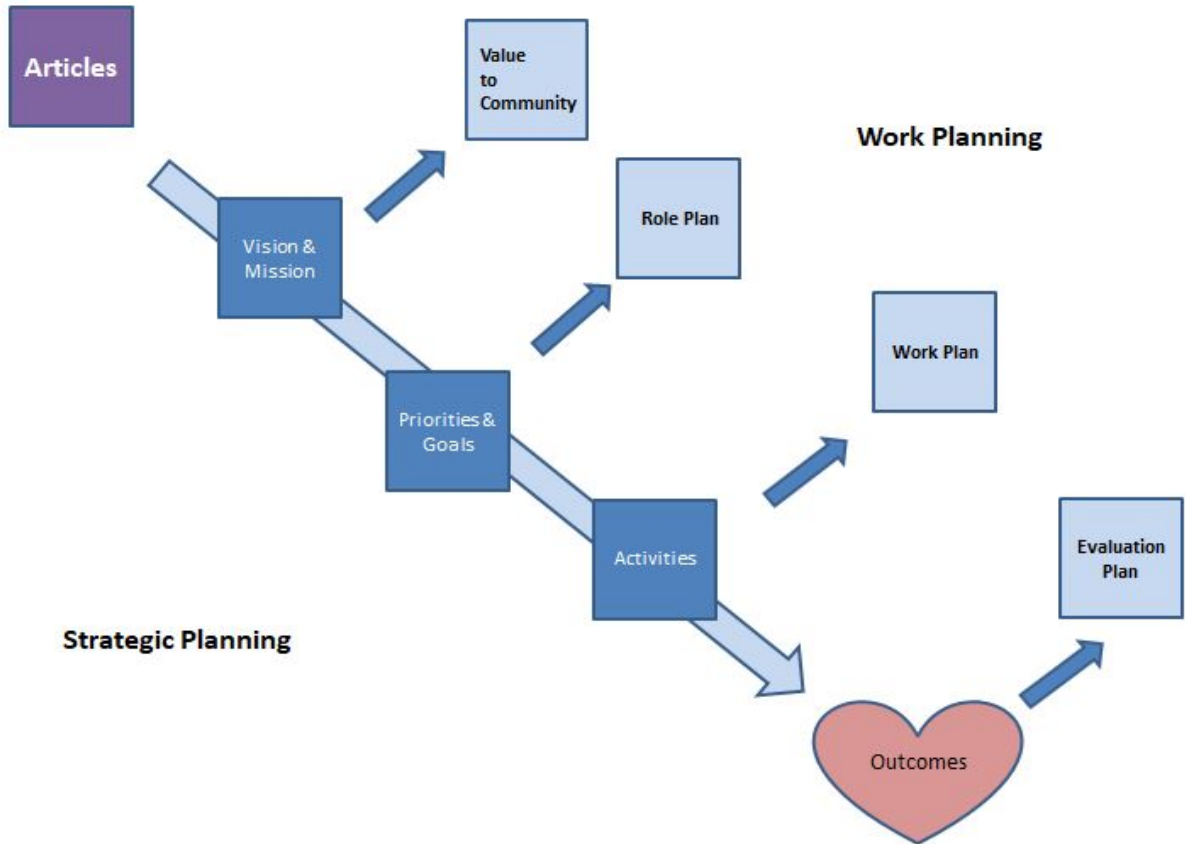
SweetWater was able to learn, adapt, change, experiment and deliver throughout the pandemic. And the learning continues. As an organization SweetWater has learned about resilience and the importance of flexibility. SweetWater's donors, supporters, funders and volunteers rallied to make sure that the music happened, that the musicians could bring their gifts to our community, and that SweetWater would survive.

Methodology

This Strategic Plan is based on information and data collected from a wide range of sources including: learning from the evaluation of the 2018-2020 Strategic Plan, a review of literature on strategic planning for cultural and arts organizations, workshops with the Board and staff, interviews with industry leaders, peers and key stakeholders, a SWOT Analysis with the identification of key strengths, threats and themes, input from Board and staff on draft strategic priorities, outcomes and activities, and a discussion on what was learned from the 'COVID' year 2020. More methodology details are in Appendix 1.

Strategic Planning Process

The diagram below, created by Marilyn Struthers, provides an overview of the strategic planning process that informs this plan:



SweetWater Vision

Music that inspires, challenges and connects.

SweetWater Mission

A showcase for internationally acclaimed Canadian and global artists providing audiences with unique, intimate, and cutting-edge musical experiences to engage the mind, the spirit and the community.

SweetWater Values

- Deep listening and emotionally rich music experiences
- Service to the community
- Building audiences
- Building bridges and connections
- Innovative and resilient future
- Inclusion and access
- Collaboration and partnerships

(see Appendix 2 for full Values Statements)

Touchstones

Touchstones are a new addition to SweetWater’s Strategic Plan. They provide a focus over the next 3 years for all areas of SweetWater’s work. Four Touchstones emerged from the consultations and research:

- **Excellence:**
Creative inspiration, critical acclaim, and inventiveness, with Vision at the centre
- **Opportunity:**
Diverse voices, possibilities, adaptability, capacity building and growth
- **Reach:**
Inclusion, equitable access, and engagement
- **Connection:**
Belonging, community, relevance, mutual support

*‘SWMF inspires our local community to strive for excellence in all creative and artistic pursuits and creates a local culture that believes in the arts as a central part of the human experience’
(Industry Leader)*

Four Strategic Priorities

The Strategic Priorities came from data collected through workshops, discussions, and interviews with internal and external stakeholders.

Nine requirements for success for arts organizations were identified from the data:

- Stay true to Vision
- Survive
- Engage the highest caliber of musicians
- Communicate what we do
- Embrace digital possibilities
- Collaborate
- Music and relationships are at the centre
- Innovate
- Deepen community connections.

‘SWMF has a very strong identity that is the centre of the organization. Music is always at the centre, and performers know that the audience is really listening’ (Industry Leader)

These requirements for success were distilled into four strategic priorities:

1. Lead with Vision

SweetWater’s Vision is central to artistic programming and the organization’s work

‘Music that Inspires, Challenges and Connects’ provides direction and focus for all aspects of the organization’s work. The Artistic Director communicates and articulates the Vision in programming. The Board ensures that the AD is supported and that SweetWater’s Vision is at the centre of planning and decision-making.

2. Embrace Innovation

Leverage new resources and approaches to program by ‘thinking outside the box’.

Innovation, adaptability, ‘thinking outside the box’, leveraging new resources, and new approaches to programming are key to success for arts organizations in these COVID times. SweetWater will embrace innovation to attract younger and diverse supporters and audiences, make music and performances more accessible, and broaden the reach of the organization.

‘Younger people don’t know how to be part of SweetWater. You need another approach.

(Industry Leader)

3. Build Resilience

Build on our history and strengths to increase resilience.

SweetWater has a strong identity with many successes and challenges over the 17 years of its existence. Resilience, hard work, and a deep commitment to music and musicians contributed to SweetWater’s success with the challenges of the COVID pandemic in 2020. We will build on our history and learning to build strong and resilient governance planning.

‘Long-term financial stability and consistent artistic achievement are inextricably linked. Institutions that do not recognize this fact will become increasingly weak.’

(Strategic Planning in the Arts: A Practical Guide)

4. Foster Collaboration

Create intentional connections to expand learning and opportunities for shared initiatives.

SweetWater is known for its positive relationship with artists, volunteers, and supporters. We will expand collaboration by building intentional connections locally and with other festivals to share learning, resources, expertise, and create opportunities for successful joint projects and initiatives.

‘No one organization has all of the ideas.’

(Stakeholder Interview)

Strategic Priorities, Goals, Activities and Outcomes

1. Lead with Vision: *SweetWater’s Vision is central to artistic programming and the organization’s work.*

1.1 Goal: Support and assist AD leadership and artistic vision.

Activities	Expected Outcomes
<ul style="list-style-type: none"> AD communicates SW Vision and his artistic Vision with key supporters, sponsors and donors, as well as with community members, patrons and funders. The AD embodies the core SWMF messages and brand and works closely with GM and Board to develop strategic and engaging messaging for the public. Board refines governance model (from previous SP) and works with AD and GM to develop procedures for effective communication, clarity on decision making, and role clarity. AD and GM report regularly on execution of artistic Vision, and execution of Vision is included as part of performance reviews. Annual evaluation of Board performance ‘leading with Vision’. 	<ul style="list-style-type: none"> AD successfully communicates SWMF Vision in programming and in community. AD is supported in a collaborative relationship with Board. Roles are clear and supported by good communication and shared decision-making. Artistically and critically acclaimed programs and events. Artistic freedom and balance that allows AD to experiment Vision-focused collaborative working relationship between AD & GM based on role clarity, good communication and respect. Programming within budget. Increased support from sponsors and patrons.

1.2 Goal: Develop a planning and evaluation framework to support community engagement and artistic excellence.

Activities	Expected Outcomes
<ul style="list-style-type: none"> Board, AD, GM develop an evaluation framework with indicators, information gathering tools, and a timeframe focused on community engagement and artistic excellence. (Year 1) Year 2 Framework implementation, data collected, analyzed, and informs plans, projects, and activities for Year 3. Year 3 Framework continues and data informs activities and planning for next Strategic Plan. 	<ul style="list-style-type: none"> Planning and evaluation framework measures impact of activities focused on community engagement and artistic excellence. New data on programming, community engagement and artistic excellence available for planning. Planning and evaluation findings result in increased community engagement and connection, increased support from sponsors, donors, increased audiences.

1.3 Goal: Hold an annual reflection and evaluation.

Activities	Expected Outcomes
<ul style="list-style-type: none"> • Determine time, place and structure for an annual reflection and evaluation process. <i>(Currently the Board and staff meet in October at someone’s home to review the Festival – this could be expanded - has worked well as a reflection and discussion opportunity).</i> • Document findings, recommendations and what is needed going forwarded from the annual reflection. • Document stories, successes, learning for use in marketing, community connection, new projects. 	<ul style="list-style-type: none"> • Community, Board, AD, (and other stakeholders?) engage in annual reflection and evaluation cycle to determine successes and area for change. • Report on Annual Reflection & Evaluation used in planning by AD, GM, Board, and Board committees. • New stories and ideas harvested from the Annual reflection and evaluation.

2. Embrace Innovation: Leverage new resources and program approaches by ‘thinking outside the box’.

2.1 Goal: Engage musicians that are diverse, multi-skilled and innovative.

Activities	Expected Outcomes
<ul style="list-style-type: none"> • Recognize opportunities and availability of diverse, highly skilled musicians with innovative approaches for festival and community outreach programs. • Create high quality programming with multi-skilled musicians attractive for younger audiences to ‘bring’ them to SWMF. Musicians also develop relationship with SWMF and experience rural environment. • Strengthen SW marketing approaches to include strategies directed to younger audiences (innovative, diverse, multi-skilled musicians open the door to SWMF). 	<ul style="list-style-type: none"> • Increased number of diverse, multi-skilled musicians provide innovative performances and programs for SWMF audiences. • Increased number of younger and diverse audiences attend performances and programs • SWMF identity as an innovative festival grows • New relationships between diverse multi-skilled musicians, SW, and the rural area. • Increased collaboration with diverse musicians and arts groups.

2.2. Goal: Create short-term survival strategies without compromising our Vision.

Activities	Expected Outcomes
<ul style="list-style-type: none"> • Consider Festival of the Sound decision making process: 'Is this about music as the centre? Is this about music as a connection? Is this about music as the means?' Decisions need to fulfill at least one criteria. Music as a means may be needed if there is a financial threat to survival. • Prepare a draft 'what if' plan. 	<ul style="list-style-type: none"> • SWMF increases capacity to manage threatening financial challenges and maintain financial stability. • Vision at the centre is not compromised.

2.3 Goal: Embrace and develop digital potential to broaden connection, reach and accessibility.

Activities	Expected Outcomes
<ul style="list-style-type: none"> • Continue to develop and expand digital SW presence (online, live stream, social media) to reach larger and more diverse audience. • Invest in training for GM and capacity building projects for SW to build on what we have. Access resources like open source tech support, internships/summer student placements to boost capacity and complete short term upgrades. • Expand use of database and digital approaches for fundraising, promotion, marketing, and patron subscription service. Continue to grow database and include donors, supporters, audience members, performers, and sponsors. Everyone is part of the SweetWater family. • Develop online collaborations, and partnerships. • Update the website with a focus on clarity and ease of use. 	<ul style="list-style-type: none"> • New capacity to deliver online programming and music options. • Expanded audience and community connections through digital outreach. • New digital-based database provides data for planning, community engagement strategies, growing supporter involvement, stewardship, gratitude and acknowledgments. • Increased financial support, sponsorships, revenue streams and fundraising. • Increased connections and collaboration with diverse music and arts performers. • Increased awareness of SWMF, with broader geographic reach, and increased accessibility.

2.4 Goal: Expand opportunities, try new things, and take risks.

Activities	Expected Outcomes
<ul style="list-style-type: none"> • Consider ‘pilot’ projects to test drive innovation, engage community members, minimize risk (for example – programming for youth, families, community engagement projects) and include rigorous evaluation. • Access grants to fund higher risk, innovative projects. • Develop Board expertise and comfort dealing with risk and Board capacity with risk mitigation. Develop Board governance approaches that support learning, discussion, risk taking, innovation, and relationships based on trust. 	<ul style="list-style-type: none"> • New programs and performances piloted and evaluated. • Increase in innovative high quality programming. • New, effective governance approaches.

3. Build Resilience: *Build on our history and strengths to increase resilience.*

3.1 Goal: Build on SWMF story as a recruitment tool for artists, audiences, volunteers, partners, funders.

Activities	Expected Outcomes
<ul style="list-style-type: none"> • Collect stories from patrons, funders, musicians, etc. over next 3 years. • Recruit SW Ambassadors and develop <i>Pass it On</i> Campaign over next 3 years. • Create a film on SweetWater COVID pivot to highlight innovation, quality, fearlessness, and connection to the community. (An OTF proposal?). • Audience Development Committee develops new community engagement plans and activities. • Develop and consolidate 2-way communication strategy: a) Ways for supporters to provide feedback and b) key messages (stability of the organization, strong governance, excellence of programming, connection with community) used consistently in all communications. 	<ul style="list-style-type: none"> • SweetWater stories, testimonials are collected for 2024 20 Year Celebration. • SweetWater Ambassadors are engaged and connect in the community through the SweetWater <i>Pass it On</i> campaign. • The COVID film increases recognition of SweetWater as innovative, exceptional, and responsive to community needs. There is increased awareness of what SWMF offers. • Connection and funding from new and diverse patrons and broader levels of support. Increased size of audience and increased revenues. • SWMF is recognized locally and beyond as a solid, well run organization that delivers exceptional performances and audience experiences.

3.2 Goal: Build a Financial Sustainability Plan that includes a Contingency Plan, a Legacy Plan and a Stewardship Framework.

Activities	Expected Outcomes
<ul style="list-style-type: none"> • Endowment Committee develops a 3-year plan with increasing revenue targets and strategies to build endowment funds. • Board develops policy that makes contingency funding mandatory in all budgets and serves as a guideline for determining the amount. • Resource Development Committee establishes a <i>Partnerships 2023</i> plan with annual targets. This includes new and expanded outreach with corporate donors, supporters, festival partners and public funding. • Develop a new Special Events Fund with dedicated budget for AD to use for events, opportunities, and commissioned works. • Develop an overarching Stewardship Framework for SWMF that builds opportunities for increased support and engagement for audience members, supporters, partners, and ensures supporter are tracked, acknowledged and valued. 	<ul style="list-style-type: none"> • SWMF Global Financial Plan in place with annual targets and activities for Legacy, Contingency, and Operating Revenues to strengthen and diversify SWMF financial base. • Increased revenues for Operating Expenses and Increased financial security through endowed funds. • New and successful Corporate and Supporter fundraising activities, and increased number of supporters. • New works, events, opportunities realized by AD contribute to SWMF artistic excellence. • Patrons, sponsors, community members, supporters, volunteers, artists (anyone who has anything to do with us) are recognized and remain involved in the organization. • Consistent messaging and approaches throughout the organization and its various activities and tools.

3.3 Goal: Create a sustainable Succession Plan for Board members, Artistic Director, General Manager and Volunteers.

Activities	Expected Outcomes
<ul style="list-style-type: none"> • Establish a Board Succession Committee to: identify skills, qualities, diversity needed for the Board, actively recruit and vet candidates, organize member orientation and support. • Support new Board members (formal orientation, buddy with experienced Board member, training on Board values, plans, decision making). Ensure new Board members find connection and purpose. • Board committees develop Terms of Reference 	<ul style="list-style-type: none"> • Board and governance stability and volunteer capacity to achieve organization’s plans and goals. • Board member retention and satisfaction. Increased diversity. New Board volunteers contribute skills and expertise quickly. • Cohesive Board and effective working relationships. • Board committees are clear on their scope of work and their work is focused and evaluated as part of

<p>and complete an annual workplan and evaluate the workplans that are presented to the Board as part of the SWMF Evaluation Plan.</p> <ul style="list-style-type: none"> • Engage Board members as ambassadors to other events and festivals, for other Boards and organizations to make community connections, raise SWMF profile, and recruit future Board members. • Increase recruitment and training of diverse volunteers (age, race, Indigenous status, ethnicity, economic status, gender, sexual orientation) to: support committee work, as community ambassadors, to support festival operations and events, to assist with fundraising and publicity, as potential future Board members. Provide public acknowledgement, volunteer management, and opportunities for input. • Engage youth as SweetWater volunteers and ambassadors who will connect with youth and the community and with SweetWater. • Maintain accurate and up to date position summaries, performance review processes, compensation review processes, and decision-making processes, and complete annual reviews of services and compensation. • Review compensation goals for SWMF to ensure the organization is competitive if the AD or GM positions become vacant. • Ensure process for recruitment, selection and orientation for the AD and GM positions are known and available to the Board. 	<p>the overall SWMF Strategic Plan.</p> <ul style="list-style-type: none"> • Increased number of diverse volunteers who are part of Team SweetWater and feel part of the organization and its success. Increased committee and volunteer effectiveness. • Increased profile in community for Board members and for SweetWater. • Increased number of volunteers making connections between SWMF and the community, providing volunteer services and work, potential future Board members, and making personal connections to SWMF. • Contracts, roles and responsibilities and reviews of performance and compensation are current for AD and GM. • SWMF Board is aware of process for the recruitment, selection, orientation and training of a new AD or GM, if needed. • Contracted staff (AD and GM) are well supported in their work and appreciated for their contributions. • SWMF is competitive with other arts organizations and can recruit skilled and exceptional artistic and management leaders. • The Board can quickly respond to a vacancy and recruit a skilled replacement.
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4. Foster Collaboration: *Create intentional connections to expand learning and opportunities for shared initiatives.*

4.1 Goal: Create intentional connections with other festivals.

Activities	Expected Outcomes
<ul style="list-style-type: none"> • Immediate focus on connection and building collaboration with Festival of the Sound (Parry Sound). First step: AD reaches out to FOS AD James Campbell, a friend of SweetWater. GM reach out to their ED to look at ways to build connection, opportunities for collaboration and potential for a Georgian Bay Festival circuit. • Continue to strengthen the relationship with FOS, increase collaboration and engage in joint projects. In Year 2 and 3 reach out to Collingwood Festival, and other like-minded festivals to increase networking, information sharing, opportunities for collaboration. • Immediate outreach to Summerfolk, led by AD. 	<ul style="list-style-type: none"> • New collaboration and networking with sister Festivals in the Georgian Bay area and beyond. • Collaboration with Festival ‘Network’ increases SWMF profile and audience attraction from outside of Grey Bruce. • New collaboration and partnering with area music festivals (all genres) in the Grey Bruce region. • Increased local recognition of SWMF brand, increased local attendance, increased local profile and support. • Increased recognition of Grey Bruce as a HUB for the arts, with SweetWater as a premier event.

4.2 Goal: Share our brand through collaboration with diverse partners to increase our profile

Activities	Expected Outcomes
<ul style="list-style-type: none"> • Develop and implement outreach to Grey and Bruce tourism to profile SWMF as a premier cultural event. • Develop formal relationships with key local festivals, organizations, venues, performers, and events to share SW brand and build opportunities for collaboration (masterclasses, shared artists, marketing, shared projects, mutual support). • Education and Outreach Committee focus on collaboration with educators and young musician development opportunities to position SW as stakeholder in supporting music for the future. • Strategic outreach and relationship building with municipalities of Owen Sound, Meaford, Southampton, Port Elgin, Thornbury, Markdale-Flesherton, Kincardine. 	<ul style="list-style-type: none"> • SweetWater is profiled in regional tourism publications and contributes to a Music/Art Map of Grey Bruce. • New collaborative partnerships with area festivals, venues, performers, and events connect SWMF with the local community. • New collaborative partnerships with music teachers and educational programs connect SWMF with the music education community and contributes to the development of young musicians. • Formalized strategic partnership with Festival of the Sound • Formal collaborative partnership with String Makers/Luthiers includes communication, goals and mutual benefits. • New collaboration with area municipalities increases local awareness and municipal support for SWMF as

<ul style="list-style-type: none"> AD and GM connect with peers from other festivals and music organizations, for knowledge sharing, innovation, and collaborative projects as part of regional Network. 	<p>a premier cultural event.</p> <ul style="list-style-type: none"> Increased knowledge sharing, collaboration and mutual support through artistic and organizational connections make the arts sector in Grey Bruce more robust and resilient.
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4.3 Goal: Highlight meaningful expressions of art that bring people together with music as the bridge.

Activities	Expected Outcomes
<ul style="list-style-type: none"> Leverage the beauty of the natural area to attract new audiences and amplify the experience of the music. Develop a ‘Welcome Mat’ concept – programming that is accessible, engaging, and takes down the barriers of a formal concert. Build in opportunities for involvement in SW and meaningful expressions of art for people of all ages and abilities and income levels. Integrate information and education about musicians, music, composers, performing arts in SW live and digital offerings. Program high quality and diversity music styles with diverse artists to bridge cultural and artistic traditions. 	<ul style="list-style-type: none"> SweetWater’s brand is embedded in the built and natural environment of Grey Bruce. SweetWater is known regionally and beyond as a cultural and artistic highlight and meaningful experience by community leaders and citizens. SWMF represents the diversity in the region and is an organization where everyone belongs. SWMF is known as an organization that connects people with music in many innovative ways. SW has stronger support from younger and more diverse audiences.

Evaluation of the Strategic Plan

- Annual Report on community connections and artistic excellence with planning and evaluation framework.
- Regular Board and committee reports on SP workplan progress, achievements, issues, recommendations.
- Annual report from each committee on progress, achievements, issues, recommendations from the implementation of their workplan, and their plans for the next year.
- Annual review of Board governance by Board.
- Annual review of programming by Artistic Director.
- Annual review of operations by GM.
- Annual Performance Reviews of AD and GM.
- AGM Report to the membership on Strategic Plan accomplishments and next steps.

Next Steps

- Share the Strategic Plan with core SweetWater supporters and stakeholders, as well as participants in the consultations, and on SWMF website.
- Determine what work needs to begin or has already begun for Year One (2021) of the plan. Determine what work will begin in Year 2 and/or Year 3 of the plan.
- Board Committees develop their workplan for 2021 based on the priorities for action and include details of activities they will carry out to achieve their goals. Committee workplans and evaluation plans are presented to the Board for comment and acceptance.
- The Executive Committee develops a draft workplan for the Board as a whole and presents it for further discussion and acceptance at a Board meeting. The Board also determines how they will evaluate the Board workplan.
- Consider providing a high-level overview of the priorities and goals to supporters and donors as part of the next e-blast.
- Use the high-level overview for funding proposals and link proposals with the Strategic Plan (fundors like to see that the organization is prepared to carry out a project that fits within their strategic plan).

Appendix

1. Methodology

- Evaluation of previous Strategic Plan (2018-2020) by Board and committee members.
- Review of literature: Toronto Arts Council Strategic Planning in the Arts: A practical Guide, Current Strategic Plan and evaluation of the plan, Governance Resources from Marilyn Struthers. An Elegant Process: The Artistic Process/The Planning Process (Nello McDaniel & Gregory Thorn) Leading Arts Boards: An Arts Professional's Guide, Nello McDaniel and George Thorn, The Manual of Strategic Planning for Cultural Organizations, (Gail Dexter Lord & Kate Market), Other? – move this list to appendix?
- Two Board workshops: Blue Skies (summer 2020), Internal Review of Strengths and Weaknesses (Fall 2020) and review of workshop notes.
- Interviews with 4 patrons conducted by the Board co-chairs and review of notes.
- Development of an interview guide and consultation plan for an External Review of Opportunities and Threats with music industry leaders.
- Key Informant Interviews with 9 industry leaders (local and external).
- Theme Analysis of transcriptions from the key informant interview to establish themes, recommended actions, opportunities, and threats.
- Completion of the SWOT Analysis. (Appendix)
- First Draft with Strategic Priorities and Goals presented to Board .(Nov. 2020)
- Facilitated Workshop with Marilyn Struthers: Confirmation of Strategic Priorities and Goals and detailed Actions. (March 2021)
- Emailed contributions to complete Confirmation of Strategic Priorities and Goals and detailed Actions. (March 2021)
- Final Draft Plan for Board review. (March 2021)
- Approval of new Strategic Plan by Board and at AGM. (March 18, 2021)

2. 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.
- **Innovative and resilient 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. We seek out and support innovation and build resilience to overcome obstacles and find success.
- **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.

3. Learning from the COVID Pandemic:

At Final Workshop on the Strategic Priorities, Goals, Actions and Outcomes, participants said SweetWater learned:

- Always have a plan B, and a backup for Plan B
- Be open to new possibilities, the needs & responsibility to the audience, with a focus on making music happen
- Inspiration – music/mission (music and & audience hungry for music)
- We had to revise our financial approach, be cautious and practical, and it worked
- People set priorities for themselves – everyone was doing something to make it happen, also doing things that matched their strengths.
- Restrictions can be a fast route to innovation
- Coincided with a shift in leadership with the new AD and a shift from ‘inside’ to ‘outside’. We wanted to be seen out on the street and in the community and not only in a concert hall before COVID, and so this idea was expanded.
- Gave AD a mandate to be experimental, and it worked. The AD had a commitment to making music happen, with confidence to get up there and do it
- Artistic and organizational leadership (Board and staff) was mobilized and building on the successes from previous festivals.

- Leadership – everyone worked very hard, everyone came together, enjoyed the whole process. Capacity around teamwork, trustworthy, fun. Trust is an important basis for teamwork.
- Determination to make sure a festival happened – we were flexible and looked at different options, everyone contributed ideas and made it happen.
- Creating ‘magic’ that is based on trust, responsibility to the community.
- Everyone was ‘on board’ and 100% sign on, and no doubters – all worked for it, and no one worked against the plan.
- Trust with the audience – that we would provide excellent music and programming and a safe environment for the audience.
- Inspiration needs to be included – it comes from the music, the Vision, mission, but at the core the inspiration of the music.
- The acid test for our mission.

4. SweetWater Consultation Participants

Industry Stakeholder Interviewees

Alan Walker, CEO Ontario Arts Foundation

James Campbell, Artistic Director, Festival of the Sound

Mark Fewer, Artistic Director, Stratford Music Festival, past AD and co founder SweetWater Music Festival

David Adair, Manager, Georgian Bay Symphony

Mary Reynolds, Board member Leith Summer Music Festival

Sebastian Ostertag, Director, Orchestra North and Noon Hour Series Owen Sound

Edwin Huizinga, Artistic Director SweetWater Music Festival

Paul Eichhorn, General Manager SweetWater Music Festival

Michael Vair Haley, Music Producer, SWMF Board member

Workshop Participants - SweetWater Board of Directors

Lynda Montgomery, Co chair

Jill Willington, Co chair and Treasurer

Jackie Mersich, Secretary

Colleen Purdon, Past Chair

Vivian McCaffrey

Mary Gray

Michael Vair Haley

Michael Adler

Charlotte MacFarlane

SweetWater Supporter Interviews

Ewan and Cynthia Porter

Judy and Ken Thompson

5. SWOT Analysis – Internal and External Findings

SWMF Strategic Planning SWOT Analysis

Internal Review

1. Strengths and Weaknesses (board input)

Strengths

SweetWater Music Festival is highly regarded as a world-class festival with a 17-year history of high quality and professionalism (calibre + history + reputation).

Possible Strategic Directions:

- Share this prestige status while promoting the Festival.
- Share this prestige status while attracting musicians
- Share this prestige status while attracting funding.
- Share this stability and reputation while recruiting Board members and volunteers (good news story).
- Highlight that financial contributions for the Festival are applied directly to the event.
- Leverage audience loyalty by encouraging audience members to offer their gardens for events.
- Leverage the loyalty derived from SweetWater's commitment to high quality to secure audience expansion and ensure volunteer recruitment/retention.

SweetWater Music Festival is an intimate and authentic experience for musicians, audience members, and volunteers.

Possible Strategic Directions:

- Share this description while promoting Festival.
- Get quotes from musicians, audience members, and volunteers from past festivals.

SweetWater Music Festival volunteers have experience with effective fundraising

Possible Strategic Directions:

SweetWater Music Festival has established administrative and accountability structures, and routinely evaluates their effectiveness.

Possible Strategic Directions:

- Promote this integrity and stability to funders and donors.

Weaknesses

Limited Community Support

Possible Strategic Directions:

- Build communication and collaboration with local community (e.g. choirs, music teachers, DIA, Chamber of Commerce, Community Foundation) through Edwin and each Board member. Promote that businesses can share the financial benefit of Festival traffic.
- Encourage demonstration of communities welcoming musicians (e.g. banners, store window displays, restaurant vouchers).
- Encourage community billeting for musicians.
- Include SweetWater images in area tourism promotion material.

Audience Development (Ideal trajectory: Discover- Experience- Engage- Support)

Possible Strategic Directions:

- Build network with other communities (Guelph, Kitchener, Toronto) and their festivals. Share information, social media, cross promotion, AD's connection to other events.
- Clarify and build the brand locally.
- Increase access for a diversified audience (perform in public spaces, Market etc.) reduce the stigma of elitism associated with classical and jazz music.
- Frequent messaging.
- Leverage audience loyalty by encouraging audience members to 'bring a friend' for a reduced ticket price.
- Create Audience Development Committee. Embed Committee in SweetWater bylaws.
- Diversify music styles.
- Include pre-performance explanation to enrich the audience's experience.

- Introduce and provide some background re. the musicians either via online (e.g. Front Row Seat) or at a live performance.
- Continue opportunities for community involvement e.g. school connections, children's programs during the Festival, and Classical Jam.
- Pair music and dance.
- Include local musicians/artists to participate in the Festival and/or events between festivals.

Financial Vulnerability

Possible Strategic Directions:

- Develop a varied audience to engage and then to support SweetWater.
- Develop corporate partners (a Board or community person could be that link).
- Seek contributions from area municipalities: e.g. Owen Sound, Wiarton, Southampton.
- Fundraising Committee to be renamed Resource Development Committee. Embed Committee in SweetWater bylaws.
- Delineate and share how SweetWater benefits area business. Create mutually beneficial linkages (e.g. performance at a Gallery), and highlight elements of the built and natural environment.

Lack of Board Member Diversity

Possible Strategic Directions:

- Establish a Board Development Committee to identify and attract new Board members. Embed Committee in SweetWater bylaws.
- Connect with young professionals (via Board Development Committee, encourage membership as a resume/skills building opportunity) for possible recruitment.
- Promote the value of community involvement by means of financial support and volunteering.
- Determine preferred Board member skills and target recruitment efforts accordingly.
- Analyze audience and target recruitment efforts accordingly.
- Add at least two new members by spring 2021 to fill anticipated vacancies.
- Advertise/targeted recruitment for Board and Committee vacancies. (improves recruitment and builds awareness of SW)

No Artistic Director Succession Plan

Possible Strategic Directions:

Diminishing Pool of Volunteers

Possible Strategic Directions:

- Analyze audience and target recruitment efforts accordingly.

External (Industry) Review

Opportunities and Threats

(based on 9 interviews and literature)

Opportunities

Vision at the Centre – staying true to vision, commitment to vision

- Stay true to vision – SW has a very strong identity that is the centre of the organization. Music is always at the centre, and performers know that the audience is really listening
- SWMF never tried to be too big – focus on artistic integrity
- Artistic freedom of AD
- Recognize creativity, community based zeal of AD
- AD communicates vision, and articulates the vision and how it is reflected in programming.
- AD may need to convince small communities that the outside is not the enemy – balancing vision with demands for ‘local’ talent’ (rework this idea to be more positive).
- Programming is driven by vision and AD needs to be the leader
- Suggested decision making foci: Is this about the music as the centre? Is this about the music as the means? Is this about music as the connection? At least one has to be met – best when 2 or all 3 are met. Tool for decision making

Survive

- May need some things that pay the bills (side gig?)
- Balancing act – may be necessary to bring in Billy Joel to help with survival – but be honest about his role in the survival – that short term strategies to make money to survive are necessary, without changing vision, or being dishonest with programming
- Keep email and data base lists up to date
- Avoid board panic – focus on vision and purpose, avoid panic responses
- Necessity of a contingency fund
- Regeneration of board, committee members and volunteers, diversification of volunteer base.
- Expanded sources of funding to broaden financial base.

Highest caliber of musicians

- General level of musicianship is higher and higher while opportunities for musicians to work have diminished – opportunity.
- More diverse musicians – Drew Jureka as an example – highly skilled, multi skilled. Embrace the ‘shifting identity’

- Focus on high artistic and meaningful expressions of art that bring people together

Communicate what we do

- Rework website – everything we want to say about SW on one page
- Clarity about what we do
- New media possibilities to build on what we have – messaging, communication to reach a broader and more diverse audience.
- Integrate across all mediums and marketing

Embrace digital possibilities

- live stream, online lessons,
- digital performances so younger audience can ‘try it out’. explore
- for marketing,
- fundraising (crowd funding, Patreon subscription service,)
- social media
- online streaming
- Online provides connections in a new way – opportunities outside of the region, expand audience outside of live performance, expand audience reach (James Campbell example)

Collaboration

- No one organization has all of the ideas
- Information and ideas sharing
- Working with other artists and mediums
- Working with businesses
- On line collaborations (example of working with a church that has equipment)
- Pro Bono collaboration – website example
- Work directly with Festival of the Sound, Heartwood to co create, co produce concerts. Look at cost sharing for artists.
- ADs share insights to support one another and music organizations

Music and relationships at the centre

- Keeping patrons engaged is really important – turned out to be a critical thing to survive covid. Importance of sharing information and making connections.
- In times of fear we need to support one another, personal connections (challenging times for organizations and for people)
- Auditory is at the centre of the music experience
- Good venues – Leith and Georgian Shores (less excited about Roxy)
- Build on positive relationships and attachments that musicians have with this region – intentional connections.
- People are hungry for music and musicians need work

- Create opportunities for parents and children at SW – accommodate their needs and needs of younger people.

Innovation

- Risk taking
- Adaptability
- Thinking outside the box
- New repertoire, programming and venues
- Open source innovation
- Leveraging of new resources (example OCAD summer student)
- Continue to be innovative and creative – help ourselves
- Look at doing music in new ways, try new things.
- Covid experience - learning on the fly – teaching us the act of community and music performance
- Younger people don't know how to be part of SweetWater – need another approach.

Deepen community connections

- Work intentionally with community (Mark's example of celebrating music teachers at Stratford because they are critical for future)
- Music is a community necessity, not an entertainment
- Connection between local and extended is a good thing
- No asshole rule – can't come to SW if you are an asshole
- Connections with community is constant work – need to be centred on the networks and relationships the AD and board members have
- Making connections over a broad network of supporters or like minded people/groups can lead to exciting new possibilities
- Democratizing our brand of music is an opportunity, and a goal of Edwin's
- Bring together the music industry in our area – SW as host
- Connection with people is key to success
- Build our volunteer base, especially with younger generation

Constraints and Threats:

1. Covid restrictions and impact on musicians, performing arts, health and safety, anxiety about spaces and attending performances.
2. Concerns about permanent loss of organizations, government and donor resources, musicians forced from their profession, young people not studying music or going into music careers. 'loss of a generation of musicians'
3. Concerns about the lengthy recovery even after covid is done – impact on volunteer boards, need for change, lack of supports, financial and sustainability capacity.
4. Concern about audiences not coming back to live performances, new habits, more screen time, loss of audience members even after covid ends.

5. Switch to online, digital not easy – lack of capacity, technical expertise, resources to buy equipment, not accessible for many, screen overload, competition with others as everyone goes online, quality of performances, restrictions with online platforms and experiences, loss in revenues and ticket sales (will people pay to hear an online performance?).
6. Concern that online will require visual approach (music video - entertainment) to entertain or get an audience. Visual experience more than music experience, competition with 'shows'.
7. Concern that local boards will be overwhelmed, panic, lose focus and move from vision in order to survive as organizations. 'playing to the audience instead of playing music that is central to the vision'. Concern that boards turn into themselves if there is no vision from their AD – focus is on practical and organizational worries. Concern that boards are facing hard decisions around finances, investments, sustainability.
8. Concern that in times of fear we default to what we know, when a different approach is needed.

Some actions that have come forward:

- Collaboration – show up at other events, existing festivals and offer something: master class, performances, shared artists who will tell the audience in the summer to come and see me at SweetWater
- SweetWater as cultural highlight for OS and region – Put SweetWater on the Map: presentations/deputations to Grey County, Bruce County, OS City Council (increase their knowledge, partner, leverage and inclusion in their marketing) Use a 'playing approach' Take a few SWMF musicians and have them play a short piece – then talk.
- Recruit some politicians, ex politicians, family members of politicians as board, committee SWMF volunteers. Personal and relational influencers.
- SweetWater is a fall festival – need to have some summer 'teasers'
- Embrace Fall Festival – market it – off the beaten track, away from the summer crowds, niche marketing done strategically.
- FOS and SweetWater – more formal and strategic partnership- see James Campbell notes
- Strategic activities in surrounding communities, especially Southampton, Port Elgin, Meaford, Thornbury, Flesherton to bring locals and newly arrived retirees to SweetWater.
- Create a Music/Art Map of Grey Bruce – where are things happening, where can SweetWater 'pop up', build connections
- Adopt JC decision making framework for SweetWater: music at the centre, music as the means, music as the connection.

Notes:

Strat Plan – needs to solidify AD leadership through vision

Actions – from Charlotte's Strategic Objectives list from Opportunities and Threats

Pandemic Impact, Talent Recruitment, Audiences: Strategic Objectives to mitigate threats:

- Ingenuity/innovation
- Create occasions for more people to experience classical and jazz music
- Regular contact with audience/donors to maintain presence and to demonstrate relevance
- Connect with other music organizations to promote music programs for small children

Regeneration, Talent Recruitment, Future Stability

Strategic Objectives to leverage opportunities:

- Arrange events that rely on close-to-home talent and small, or outdoor, venues (garden concerts, musicians along forest paths...)
- Use technology e.g., livestreaming to broaden audience and to engage those who are unwilling or unable to gather
- Create new artistic partnerships with neighbouring organizations/events to share costs and to link audiences from one event to the next (e.g., create ‘event packages’)
- Regeneration of Board, volunteer base and audience
- Consider a range of age groups when organizing events (e.g., lead time for ticket purchase, family friendly event times)
- Provide music education mini sessions e.g., instrument show and tell, introductory comments, pop up concerts (a “taste” of SweetWater”) in areas with pedestrian traffic (democratization of classical/jazz music)
- Include testimonials in promotional material
- Arrange a virtual conference re. the next stage for arts organization. Would be an opportunity for the music community to connect and build
- Prioritize creation of a buffer fund
- Utilize alternative promotion approaches to attract a more diverse audience (e.g., “influencers”)
- Identify new sources of funding
- Pandemic may limit willingness for long indoor events. Offer short ‘snapshot’ events to showcase SweetWater quality, and to address the shorter attention span of potential audience members.
- Connect with public to identify and respond to their interests
- Provide pre- and post-concert talks, education sessions online and in person.
- Offer a limited number of reduced price tickets with seating in locations throughout venue to young people (e.g., TSO TSOONDCHECK)
- House concerts can be tailored to younger people. Not as intimidating
- Collaborate with other music organizations to promote music education and qualified instruction.

Year One Committee Workplan Template

(in development)