



Client:



Grant Term:

10/2012 – 09/2013

Contact:

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Executive Director

Mercury

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Mission and Vision

MISSION

Celebrating the power of music, Baroque and beyond, teaching, sharing and performing with passion, intimacy and excellence.

VISION

Become the country's best and most highly regarded period instrument orchestra

Enrich the lives of diverse audiences

Exemplify Houston's world-class music scene.



Use of Funds

Towards the use of engaging consultant for the creation of multi-year strategic plan

Key Activities

- Engage consultant
- Set planning expectations
- Recruit committee
- Determine desired components and outcomes of plan
- Create Three-Year Artistic Vision/Plan
- Create Three-Year Business Plan
- Data gathering
- Discussion & debate

Key Deliverables

- Written Plan
- Three-Year Operating Budget
- Three-Year Capitalization Plan
- Three-Year Artistic Plan
- Metrics for Measuring Success
- Development Plan

Key Resources

- HAA Funding
- Consultant
- Engaging Community Experts
- Clear expectations about time

|| Outcomes & Indicators



Strategic Plan: Four Focus Areas

- Performance & Programs
- Audience Development
- Financial Management
- Organizational Capacity

Focus Areas Include:

- Key strategies
- Best practices
- Activities and indicators for each year
- Budgeted expectations

Outcomes & Indicators



1) PERFORMANCE & PROGRAMS

Vision in 3 years: *Distinctive, exhilarating concerts*

- Downtown Series
- Neighborhood Series
- Education Programs
- Common Characteristics:
 - Period Instruments
 - Dynamic
 - Intimate
 - Welcoming
 - Spoke presentations

2) AUDIENCE DEVELOPMENT

Vision in 3 years: *Overflowing, enthusiastic audiences in order to be more important to people*

- Invest in marketing infrastructure
- Aggressively build audience
- Collect and analyze data

|| Outcomes & Indicators

3) FINANCIAL MANAGEMENT

Vision in 3 years: *Resilient financially; no sleepless nights*

- Strong fiscal planning and oversight
- Build operating reserves
- Grow earned revenue
- Grown contributed support

4) ORGANIZATIONAL CAPACITY

Vision in 3 years: *Ensure strong organizational capacity, staff, board and systems*

- Recruit and retain excellent staff
- Invest in leadership
- Excellent system for goal-setting and reporting results
- Organization-wide evaluation
- Engaged Board committees

Outcomes Summary

Multi-Year Plan that links:

- Artistic Goals
- Finances
- Marketing
- Fundraising

Engaged Organization

Commitment to expand mission



Keys to Success

- Hire the **RIGHT** Consultant
- Achieve **RIGHT** mix of big thinkers and doers
- Ensure **Board & Staff** are engaged together
- Embrace the unexpected



Lessons Learned

- Expecting the unexpected
- Ensuring partnership between Board & Staff
- Creating space for open and honest dialogue and debate
- Planning to include big thinking, data of current status, and business plan for the future.
- Getting beyond just relying on “anecdotal information” to utilizing “facts and figures” for decision making
- Understanding that Mercury is an established fixture of Houston’s arts scene



Summary of Future Plans

- Plan shared as part of Executive Director Recruitment process
- New Executive Director began on September 1, 2013
- Despite Organizational transition, no major set-backs
- Year-One of Plan on Track
- Year-Two of Plan finalized and launched in March 2014
- Always learning, growing, striving, developing, and adapting

