

Singing City – A Case-study of Governance  
Chaos in FY '09

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Thank you to my loving and supportive husband, Michael;  
my amazingly wonderful Momma and Daddy;  
my sweet brothers Bob and Joe, and the rest of my beautiful family;  
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and of course my patient, ever-helpful, and huge wealth of knowledge-  
my advisor Jim.

Without all your motivation, encouragement and love,  
I would not be who I am.

With Love,  
Vicki

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## Abstract

What could possibly cause a non-profit organization to have three executive directors within one fiscal year?

Singing City is a non-profit choir in Philadelphia founded in 1948 on the principle of intolerance to discrimination. The choir has performed in collaboration with organizations including the Philadelphia Orchestra and to this day maintains to be a prestigious choir in the Philadelphia area. However, in FY '09, the choir experienced considerable administrative trouble when it was operated by three executive directors and two office managers.

This paper describes the organization of Singing City, giving the reader an idea of the mission and foundation which the organization was built on.

Moving on to identifying issues and problems, this paper describes the role that connection to board governance, executive planning, and attention to strategic planning played in the high executive turnover Singing City endured.

Finally, suggestions are made by the author as to how the organization may continue in a way which would improve the administrative function in order to reduce turnover.

## Literature Review

Why was there so much rapid executive turnover within Singing City, Inc. during FY '09?

This case study will analyze the reasons why Singing City, Inc. had three executive directors within FY '09, beginning with a review of relevant literature and including an examination of board governance, executive planning, and attention paid to strategic planning in three years leading up to FY '09. The motivation for conducting this case study is because, as I was the organization's last office manager and choir administrator for the organization: in conducting the audit for the FY '09, there were many discrepancies of protocol and management. These appeared to be due to there being multiple executive directors and no stable governance from the board of directors.

It appears that the reason for such rapid turnover stems from a disconnection between the board of directors and administration, including a lack of direction for the organization. This paper will examine board governance and responsibility of the organization along with the reasons that facilitated their actions. It will examine the effect of having multiple board presidents within a fiscal year and the impact it had on the administrative staffing of the organization.

A study conducted by Michael Allison shows that nearly one third of all executive directors are first-time executive directors. From that, only 20 percent want to be an executive director in their next job. Only 14 percent of the 20 percent actually do go on to become executive directors.<sup>1</sup> This study shows that many executive directors are inexperienced in their position. In the difficult time of searching for a new leader, boards are tempted to spend the least amount of

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<sup>1</sup> Allison, Michael, "Into the Fire Boards and Executive Transitions." *Nonprofit Management & Leadership* 12, no. 4 (2002), 342.

money and to find a replacement as quickly as possible.<sup>2</sup> By conducting a short search for a new employee, and combining it with a number of inexperienced executive directors, organizations are often left with leaders who lack the knowledge, leadership skills, and communication skills that are necessary for an executive director, whom they would want to possess if they want a successful leader. When the skills of the executive director are not honed, it has an impact on the organization and communication between the administration and the board of directors.

Carol Weisman describes four different types of transitions that every newly hired executive director can be placed into:

1. Following the leader- Allowing the organization to adjust to a new leader and learn a new way to accomplish tasks when losing an executive director after many years.
2. Hanging by their fingernails- Being presented with problems of finance, programming, personnel, governance, or management, and having an experienced executive director to lead the organization through a tough time.
3. Running in place- Running an organization that has a certain way of doing things and cannot be broken from its routine.
4. At the starting block- Being the first hired and paid executive director of an organization and establishing procedures while cultivating the board and volunteers.<sup>3</sup>

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<sup>2</sup> Allison, Michael, "Into the Fire Boards and Executive Transitions." *Nonprofit Management & Leadership* 12, no. 4 (2002), 347.

<sup>3</sup> Goldbaum, Richard and Carol Weisman. *Losing Your Executive Director Without Losing Your Way: The Nonprofit's Guide to Executive Turnover*. 1st ed. (Jossey-Bass, 2004), 75-77.

I will analyze and describe the executive transitions that Singing City experienced as well as explain why each new executive director is classified into the specific transition type.

When an executive director is not meeting the expectations of the organization, the board of directors is placed in a difficult situation of whether to give h/her more chances or relieve h/her of h/her job. If the executive director's work continues to be subpar, it is necessary for the board to act quickly with a well-thought plan. If the board chooses to allow the executive director to stay, in hopes of avoiding conflict or any other reason, the board risks allowing the deterioration of programs, funding, and morale.<sup>4</sup> The board jeopardizes their credibility with the organization and encourages poor ethics. If the board goes forward with a plan in place for what to do next and how to handle any unexpected turns that occur, they have the opportunity to resolve the administrative problems and go forward with a successful team.

Another reason that will be considered will be the executive planning that occurred during fiscal year 2010. By examining internal decisions made and what external factors were occurring throughout this time, I will examine what decisions were made during this timeframe and how they affected the leadership of Singing City.

There are many ways to define the role of an executive director, but the simplest description is that they ensure the organization will succeed. To accomplish this task means that the executive director must understand what the organization needs, especially when the h/she is new to the position and the organization.<sup>5</sup> Along with clearly defining the goals and plans of the

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<sup>4</sup> Goldbaum, Richard and Carol Weisman. *Losing Your Executive Director Without Losing Your Way: The Nonprofit's Guide to Executive Turnover*. 1st ed. (Jossey-Bass, 2004), #14.

<sup>5</sup> Fishel, David. *The Book of the Board: Effective Governance for Non-Profit Organizations*. 2nd ed. (The Federation Press, 2008), 58.



organization, the board can assess the executive director's quality of work, so that h/she understand what is expected. By assessing the executive director either six months after beginning the position and then once a year from then, the board and the executive director both have a clear understanding of the expectations that accompany the position. Fishel describes what should be included within an assessment, including linking their work to the strategic plan and providing a section for the executive director to provide a self-assessment.<sup>6</sup> I will use the guideline provided to show how, in the case of Singing City, an assessment of the executive director would have aided in communicating what the board expected from the executive director, and which in turn could have led to keeping the executive director in the position and making good decisions for the organization.

Fishel also examines the procedures needed to ensure the internal integrity of the organization, including procedures such as reconciling the accounts monthly as well as promptly banking all money.<sup>7</sup> I will examine what internal procedures, such as these could have been handled differently and in a way that would have improved the internal function of Singing City. By using these suggestions and improving internally, the organization could have appeared to be more responsible to outside organizations.

Externally, Fishel describes what the executive leadership can do to maintain relationships within the community. Actions such as maintaining relationships with donors, media, local governments, and providing leadership within the community while addressing issues that are pertinent to that specific

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<sup>6</sup> Fishel, David. *The Book of the Board: Effective Governance for Non-Profit Organizations*. 2nd ed. (The Federation Press, 2008), 60.

<sup>7</sup> Fishel, David. *The Book of the Board: Effective Governance for Non-Profit Organizations*. 2nd ed. (The Federation Press, 2008), 129.

area.<sup>8</sup> It is imperative for an organization to maintain such relationships so that the credibility and funding are maintained. Straying from concepts such as these sends the organization downward and risks decreasing and losing funding. These risks, combined with economic factors that were outside the organization's control, have the potential of forcing the organization to downsize its capacity, which can in turn decrease the productivity of the organization, as I will describe in this case study. I will examine how Singing City dealt with this situation when faced with it first-hand and what other options they had.

Last, I will determine the role that following or not fully following the strategic plan played in executive leadership turnover. I will give examples from the strategic plan that were followed or not, and I will examine the process of creating a new strategic plan that was completed in September 2009.

The purpose of having a strategic plan is so that the organization has a roadmap of sorts for the future. It includes the strengths, weaknesses, opportunities and threats the organization will potentially encounter on the journey towards reaching its goals. With a strategic plan, an organization is more likely to stay afloat when challenges come its way, as opposed to an organization that has no plan and has not considered what actions to take when an emergency happens.<sup>9</sup> To begin strategic planning, the board must divide into a strategic planning committee. I will examine the steps that followed and the concepts that became part of Singing City's strategic plans.

There are many aspects to consider when strategic planning. When in the process of strategic planning, the board is trying its best to make decisions that will maintain and increase the health of the organization. John Bryson lists seven

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<sup>8</sup> Fishel, David. *The Book of the Board: Effective Governance for Non-Profit Organizations*. 2nd ed. (The Federation Press, 2008), 55.

<sup>9</sup> Bryson, John. "A Strategic Planning Process for Public and Non-profit." *Long Range Planning* 21, no. 1 (1988), 74.

necessities for an organization to have if it wishes to successfully initiate the strategic planning process:

1. A process sponsor(s) in a position of power to legitimize the process
2. A champion to push the process along
3. A strategic planning team
4. An expectation that there will be disruptions and delays
5. A willingness to be flexible about what constitutes a strategic plan
6. An ability to pull information and people together at key points for important discussions and decisions
7. A willingness to construct and consider arguments geared to very different evaluative criteria.<sup>10</sup>

I will examine each concept and how Singing City related to following it as well as how each step impacted the organization

Many scholars, such as Bryson, detail the process of creating a strong, practical, and well-crafted strategic plan, but what good is having such a useful resource if it is not followed? Of course a strategic plan cannot predict if an executive director will leave unexpectedly or what path the economic climate will take. There are bound to be events that will steer the organization off-track, and when this happens, the organization must make decisions to either get back on-track or, if something immense has occurred and creates a need to stray off-track, they must make well-educated steps going forward.

To conclude this paper, I will make suggestions as to how Singing City, Inc. may proceed with future board governance, executive planning and attention to strategic planning, as well as key choices that could have been made to prevent such high turnover. It is my hope to provide suggestions that will improve

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<sup>10</sup> Bryson, John. "A Strategic Planning Process for Public and Non-profit." *Long Range Planning* 21, no. 1 (1988), 80.

communication, reduce future turnover, and increase efficiency within the organization. Beyond Singing City, other similar organizations who find themselves in the midst of executive turnover may use this information to aid in strengthening and creating a more viable organization.

All research for this paper will come from journals, books, internal documents (strategic plans, budgets, etc.) and interviews of former and current staff and board. Journals and books will be compared and contrasted to the internal documents and interviews.

## Chapter 1 – History of Singing City

“Elaine Brown isn’t just the conductor. She’s the whole damn train.”  
-Philadelphia Magazine, c. 1973

Much of the history of Singing City lies within the minds of its first members. While so much of the history has been lost along the way since its creation, fortunately there are still members alive to tell the story of this evolving non-profit organization. Interviewing two of the founder’s first assistants and closest confidants, I was inspired by their passion to this day. Janet Yamron and Sonya Garfinkle still hold firmly to the beliefs that Singing City was founded on and they tell their story passionately. Below you will find a conglomeration of Ms. Yamron’s and Ms. Garfinkle’s story along with the rare documented pieces of history that remain.

Singing City, Inc. was a project of the Fellowship House movement in Philadelphia during the 1940’s founded on the belief of music having the ability to abandon all boundaries of race and creed. During this time, racism and segregation were rampant in the United States and in response, Fellowship House was created as a way to unite people and prove that we are all equal regardless. With the concept of working despite all other matters, Marjorie Penney headed the organization with the assistance of Reverend Dr. A. Herbert Haslam.

In 1948, Marjorie Penney and Reverend Haslam conceptualized the idea of an inter-racial church choir and brought it to the Fellowship House Choir Director, Elaine Brown. At the time, Brown was Reverend Haslam’s parish choir director. Penney and Rev. Haslam pitched the concept of a choral group spreading the joy and appreciation of choral music by using a diverse group of members as a way to inspire others about acceptance and peace. This concept struck a chord with Elaine Brown and inspired her to go forward with the idea.

Together they established the group that was first officially called “Singing City a Project of Fellowship House.”

The first participants in the 15-person choir were anyone who had a passion for singing and no tolerance for racism. Brown allowed anyone to join the choir, even if they had little knowledge of music and sparse singing experience. She surrounded herself with passionate and talented music educators from around the area and offered workshops and weekly classes for anyone who wanted to build their theory, aural or vocal skills. Both Brown and her assistants received no compensation for their work. Any money that was given to them was in turn given back to the organization so that it could continue operating. This organization was completely run out of the goodness of Brown, her assistants’ and the choirs’ hearts. They all believed in the deep power of music and held onto this belief during such an uncertain time for the country. From the very beginning, Brown only referred to the choir as an “idea” and never an “organization,” for the group was created because of the idea of acceptance and calling it an organization would be a title too formal for such a group.

Singing City a Project of Fellowship House held its first festival at the Academy of Music in 1948. The organization invited seven to eight guest choirs who were based on various ethnic origins to collaborate with them in the grand concert performance. Each choir performed solo repertoire concluding with a mass choir grand finale conducted by founder, Dr. Elaine Brown. From this point, Singing City began earning a name throughout the region. They dared to spread their belief of no tolerance for segregation and proudly stood by the organization. No other choral organization- at least none other in the area- was attempting to end segregation by singing.

In 1955, the choir embarked on its first concert tour and decided the destination should be the Deep South of the United States and in honor of Brown

vs. Board of Education, since this was where racism was most prevalent. Janet Yamron and Sonya Garfinkle, both previous assistants to Dr. Brown, recounted stories of the tour, telling how they refused to eat at any restaurants or sleep at any hotels that discriminated against one of their choir members. When the choir would stop as rest stops, the white members would dare to use the restrooms designated for black people and vice versa. They pushed the buttons of racists all to prove their point. Miss Yamron told a story of arriving late at night at a hotel in Maryland. Everyone on the bus was famished, so they dropped off their luggage and walked down the street to the only restaurant open at that late hour. When the choir saw that the restaurant made all black patrons eat in the back, the entire choir loaded back onto the bus and traveled 45 minutes away until they found a restaurant that did not discriminate. They all ate and enjoyed each others' company until the sun came up and they continued on with their concert tour.

Another remarkable story Miss Yamron and Miss Garfinkle recounted from that tour was how they had called up churches in the South to perform at, but in addition to performing at churches, they asked that the parishes provide homestays for the choirs. The only stipulation with the homestays was that they must allow at least two choir members to stay at their home: one white, and one black. There was one church in particular that had been a bit difficult to contact, but the pastor had assured them they would be able to perform. When they arrived, the pastor reluctantly informed the choir that although he had told his congregation that the choir would be having a performance, he neglected to mention they were founded on the belief of no racial boundaries and he did not even ask if the choir could sleep in the houses of his parish members. The choir assured him that it was okay, and that they would hold their performance and spend the night sleeping on the church benches before continuing on their way. And so, the choir held a heart-felt performance that was so well-loved by all the

congregation. They performed multiple encores for the enthusiastic and inspired crowd. When the audience heard that the choir would be spending the night on the church benches, they immediately offered them into their homes, providing them with food, hot water and shelter for the night. This is what Singing City strived to accomplish. Even at the ripe ages of 79, Miss Yamron and Miss Garfinkle retell this story with pride and passion that would inspire anyone listening.

In 1956, Elaine Brown made the decision to leave her posts at Temple University and Fellowship House so that she may devote her time to grooming the choir. At this time, Singing City a Project of Fellowship House split apart from the Fellowship House and assumed the abbreviated name “Singing City.” It was also at this time that Singing City became officially incorporated. Singing City had no board of directors, but rather had a committee appointed to oversee the organization.

Brown devoted all her time to Singing City. With no other income, she began ringing doorbells, literally asking for donations. The first major donor to Singing City was the Phoebe Waterman Foundation who gave their support so that a youth choir would be established. Once the youth choir launched and was shaped into a fine group of diverse youth, they had the honor of performing with the Philadelphia Orchestra in a Youth Concert Series, under the baton of William Smith, who at the time was the assistant to the famed Philadelphia Orchestra music director, Eugene Ormandy.

In 1974, the choir went on a State Department-sponsored concert and outreach tour to Israel and Egypt. They risked their lives to travel in an unknown part of the world. Ms. Yamron and Ms. Garfinkle recalled needing to take two passports with them on this tour, in the event that they had one confiscated. While traveling between countries, and it being a time of tense communication



between the two countries, the choir met a bus at the border, halfway across a bridge. Every choir member had to unload the bus and walk to the next bus, where they would be allowed to enter the country. In Egypt, they held a well-praised and adored concert in front of the Sphinx where 2,500 Egyptians were in attendance.

Elaine Brown passed away in 1997, but stayed an ever-present figure at Singing City. She had raised the choir to be of excellent quality, having performed regularly with the Philadelphia Orchestra. Brown herself was awarded honorary doctoral degrees from Holy Family University, Westminster Choir College and Villanova University. Throughout her career, she conducted and taught at institutions of high caliber, including the Juilliard School, and also acted as a guest clinician across the country. She did these great things, but always found her home with Singing City and the idea of acceptance.

Janet Yamron and Sonya Garfinkle still carry the message of Singing City in their hearts and remain the best of friends with endless stories. In 2010, Ms. Yamron retired from Temple University, where she was a Director of Choirs and Dean till the age of 78. Ms. Garfinkle retired from the Philadelphia Chamber Music Society the same year.

To this day, Singing City continues to be a lively organization (or rather “idea”) devoted to doing good in the community, while still having expectations of high performance quality.

Some things have changed, such as the youth choir that had been established being eventually eliminated. The classes on written and aural theory that were intended to educate members on how to inspire and be knowledgeable sources so that they may go into the community and share their newfound passion and knowledge were also eliminated. For many years, Singing City was known solely for its 100-voice adult choir.

“Music is the greater gluer- it holds us all together.”  
-Dr. Elaine Brown

## Chapter 2 – Issues and Problem Identification

Under the banner of Performance, Education and Outreach, Singing City strives to be an artistic, social and spiritual force, bringing people together through choral music.

-Mission Statement of Singing City

Since its beginning, Singing City has maintained its role of being an inter-racial and inter-faith choir in the Philadelphia area. I began my position as office manager for the organization shortly after the beginning of the organizations new fiscal year in September 2009. One of my tasks as office manager was to work with the accountant in completing the annual audit; it was at this time I became alarmed by the rapid turnover of administration and other factors that contributed to the organizations state of imbalance. This is my investigation as to why.

### **The Facts**

During FY '09, Singing City's paid staff consisted of an executive director, music director, accompanist/assistant director, office manager, and choir administrator. The administrative positions of executive director, choir administrator and office manager were full-time positions, which included benefits. The only other administrative position was an unpaid volunteer who served as music librarian.

For the years prior to and after FY '09, the music staff (music director and accompanist/assistant director) and choir administrator positions experienced no turnover; however, the executive director and office manager positions were not as stable. The chart below shows the turnover of these two positions during the fiscal year and in the time shortly after the fiscal year.

<b>Dates</b>	<b>Executive Director</b>
May 2002- Dec 2008	Angela Scully
Jan 2008-June2009	Thomas Yarnal
June 2009	Lauren Anderson (interim)
August 2009	Lauren Anderson

<b>Dates</b>	<b>Office Manager</b>
August 2005-Oct 2008	Lisa Haun
Oct 2008- Sept 2009	Dawn Cowle
Sept 2009	Victoria Baker

Beginning in 2002, Angela Scully was executive director of Singing City for seven years and had a previous employment history of not staying in one place for very long. In 2008, Angela announced her resignation, and the organization braced itself for finding a replacement. After her departure, Singing City held a nationwide search for a new executive director. With countless applicants, the search committee whittled the hopeful candidates down to 19, and from there they held interviews and narrowed it even further to two possibilities. Thomas Yarnal- a man with experience in grant-writing and a background in theater- was offered the position.

Soon after Yarnal came into Singing City, the office manager of three years, Lisa Haun, left abruptly after having difficulty with the transition to the new executive director. The catalyst of her leaving consisted of the computer network crashing, leaving the organization with no accounting records. Haun did not leave an opportunity to pass down the accounting records to anyone else. With this unexpected transition, Yarnal decided to make the position part-time.

He posted the position and began accepting applications for a new office manager. Soon after, Dawn Cowle, a woman with a theater background like Yarnal, entered into the new role.

Until Haun had left, the office manager position had been full-time and had regular office hours. Once Yarnal decreased the number of hours for the position, he also made the office hours flexible to allow for Cowle's other part-time job.

Singing City traditionally holds an annual fundraiser each Spring, typically an auction. During the planning stages for the annual auction for the 2008-2009 season, the economy started experiencing the beginning of a recession. Yarnal made the decision to go forward that year with an elaborate fundraiser, to be held at a lush downtown Philadelphia hotel. Unbeknownst to the board of directors, Yarnal went forward with this plan, making a down payment on the venue. After realizing that the majority of Singing City's supporters would be unable to afford this lavish affair, he cancelled the booking, losing the organization's multi-thousand dollar down payment. Instead he held a "Hard Times Gala," urging supporters to log online at a set time and donate the money they would have otherwise used towards the canceled grand affair. His plans fizzled when the fundraiser brought in minimal donations.

Without having a successful annual fundraiser, the organization was now in a difficult financial position. Yarnal made the decision to eliminate the role of choir administrator, first approaching the subject with the organization during a full staff meeting.

It was after this staff meeting that the organization felt they could not handle Yarnal's disposition and communication skills. The board of directors made the decision to remove Yarnal as executive director and to hire Lauren Anderson as the interim executive director until another search was conducted.

Anderson decided to decrease the hours of the position from full-time to part-time, until the economy was strong again.

The history of Singing City was in Lauren Anderson's blood. Her grandfather was the minister of Fellowship House and helped conceptualize Singing City. Her parents met in the choir where they sang for many years. Anderson is in the choir to this day, and she and her mother sit on the board of directors. At the time of her appointment as interim executive director, Anderson was working in marketing at a Quaker School in the suburbs of Philadelphia. She has no formal training in non-profit administration, so her first year was a bit rocky. She missed deadlines for numerous renewals, including the non-profit status of the organization; however, many government organizations were forgiving after much persistence. I know from experience because I was the persistent person on the phone explaining the honest mistake.

Although Anderson was hired as interim executive director in June, the board of directors decided to call off their search and hire her as the official executive director in August. She maintained working part-time in a position that required full-time hours.

### **A. Connection to Board Governance**

Questioning how there could be three executive directors in one fiscal year, I discussed it with the people who experienced it. To gather information, I held interviews with board members, staff and choir members from FY '09. In each of my three interviews, the interviewee attributed all financial and administrative problems to one particular executive director. I did not leave it at that but then questioned the people who were supposed to be looking over the executive director: the board of directors.

It is the responsibility of the board of directors to maintain the organization, not only in terms of finances but also in day-to-day operations by overseeing staff and enforcing set policies.

I can attest that the state of Singing City's finances in September of 2009 was in ruins. They had very little money in the bank and poor recordkeeping with which to produce the necessary materials for their annual audit. The reason for this issue could be attributed to a decrease in revenue. In reviewing Singing City's 990 form, I found that the organization earned over \$65,000 less from 2007 to 2008 in gifts, grants, contributions and membership fees from public support. The sum of government grants were reported as being approximately \$150 more than the previous year, but most alarmingly the 990 balance sheet from FY '09 shows the organization starting the year with total assets of \$635,692.00 and ending the year with \$482,205.00. In 2008-2009, the organization ended the year with over \$150,000 less in total assets than when they began.

Understandably, the outside economy was very unstable; however, the huge loss of assets surely would not have happened had the board of directors been aware of the difference. My experience with Singing City showed a great disconnect between the board of directors and staff members. With such a small

number of staff members and a board of directors that met monthly at a mutually agreed upon office building, very rarely did the board ever communicate with the office. The meetings were always held a location outside of the organization's office. Oftentimes board members opted to not attend meetings regularly. Yes, the board president, Rosalinda Madara, was always reachable and eager, but many of her co-board members did not even know the location of Singing City's office.

There had been a struggle within in the board and organization for quite some time. Singing City was based upon the principle of overcoming diversity through singing, no matter the quality. The organization's mission of diversity was reflected with the board. In an interview with the current executive director, she revealed that they thought they needed at least one board member of a different race. The said board member later confided in me that he did not know why he was on the board since he had no connections and no money to offer. Given the economic struggle of the time, Singing City continued to seek this diversity, not selecting new members by what they could bring to the board. Maintaining diversity in this manner gave the illusion that the organization was maintaining its founding principle.

The organization always maintained high musical standards by offering classes for members who needed music coaching. Over time, the classes stopped and more choir members began auditioning who were familiar with music theory and vocal quality. The current executive director has a great passion for quality and has been transitioning Singing City from a volunteer choir to a professional choir. Many choir members are not happy about this transition, as quite a few are members from the time of Elaine Brown's reign who truly believe in the original mission. This disconnect is seen in the choir, administration, and board. Throughout the choir, there are different cliques of principle-based, performance-based, and a miscellaneous collection of people who are unsure how they fit in.



On the board, there are both engines of the organization that keep it running financially and creatively, and there are members who are there to satisfy the diversity principle.

In administration during FY '09, there were three executive directors with different mindsets: one was on her way out and had checked out mentally, one was an idealist who could not see the reality of financial responsibility, and the current executive director is determined to make the organization successful. Over FY '09, many ideas and personalities were running Singing City. The mission was being interpreted differently and had a negative impact over time.

## **B. Executive Planning**

Many of the executive directors' choices led to the state of Singing City's financial affairs. Fundraising choices and personal financial connections are integral to Singing City, an organization whose annual budget is \$250,000. Though at one time Singing City was renowned throughout Philadelphia and the arts community for its strong belief of unifying diversity, it has grown to group of singers with mixed reasons for being there, including those who truly believe in the mission and others who are there because of the level of quality. Still, the choir maintains roughly 100 choristers, but the turnover in new members is high and the core of the group is a large group of believers who have been members for 15 or more years.

In the summer of 2004, the organization conducted strategic planning, which culminated in a 50-page plan. The plan included a "Lift Every Voice" campaign in which the organization aimed at creating more awareness and stability for the organization within four years. Ultimately, this campaign aimed to increase the organization's endowment. In February 2006, a select group from the board came together for a discussion of the organization's progressing with its strategic goals.

Singing City's "Lift Every Voice" campaign focused on increasing the endowment with large donations from affluent supporters. A real push for the campaign occurred in 2007 when Angela Scully worked diligently to secure pledges. Once Scully left and the economy took a downfall, Singing City's Yarnal became lenient with collecting the pledges made. Yarnal demonstrated a "hanging by their fingernails" type of transition, as prescribed by Carol Weisman by the way he leading the organization through a tough time and being presented with many problems. (Weisman 2003, 75-77.) It was not until late in 2009 that

the organization made a real effort to track down the pledges. The collection happened because that year's auditor notified the current administration that there were outstanding pledges, unbeknownst to the administration. With the turnover in executive director and office manager, the staff had no way to track down the pledge forms. Lauren Anderson and Victoria Baker literally had to guess outstanding balances. The rapid turnover of executive director and office manager, in the midst of a large campaign, surely weakened the credibility of the organization.

In addition to Angela Scully's rushed departure from the organization, Thomas Yarnal's hasty decision for the annual fundraiser created a deficit for the organization and hence was dealt the brunt of the organization's distress. However, the lack of communication between board and administration actually benefitted Yarnal- he did not come under much financial scrutiny because of the board's disconnect. Eventually the drastic loss of funds was brought to the board's attention and caused them to ask for Yarnal's immediate resignation.

When Lauren Anderson began her role as interim executive director, the old office manager, Dawn Cowle, was still in place. From Carol Weisman's transition, Lauren was a "Follow the leader" type of leader, though she followed the lead from Scully and not Yarnal.<sup>11</sup> Lauren paved the way for a new way to do things, but proceeded in a gentle way so as to let her transition be accepted gradually. Prior to working at Singing City, Cowle had little experience working with bookkeeping. It was not until the FY '09 audit that the organization realized the poor state of finances- there was a weak financial record from when Haun had been maintaining records and Cowle was never trained in bookkeeping.

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<sup>11</sup> Goldbaum, Richard and Carol Weisman. *Losing Your Executive Director Without Losing Your Way: The Nonprofit's Guide to Executive Turnover*. 1st ed. (Jossey-Bass, 2004), 75-77.

Therefore, many documents were missing for the FY '09 audit. Fortunately, the government was forgiving. For the audit, Singing City needed the helpful intervention of its auditor when the organization was being charged fines for late filing of its audit.

Throughout this entire time, the economy was spiraling downward, causing a decrease in annual dues collection, a ticket sales, and donations. Even before the sharp downturn of the economy, Singing City cites external factors in its 2004 strategic plan as an excuse for the financial decline of the time. The October 2004 strategic plan specifically cites expensive venues, lack of corporate sponsorship, and a general decline in arts funding. See below the difference in sponsorship from FY '08 to FY '10 as documented in Singing City's Annual Reports. FY '09 is missing a documented annual report stating this information.

<b>2007-2008 Subscribers</b>		<b>2009-2010 Subscribers</b>	
Benefactor	13	Benefactor	19
Patron	38	Patron	27
Sponsor	28	Sponsor	10

### **C. Attention to Strategic Planning**

In October 2004, Singing City published a lengthy strategic plan that focused on the organization's goals and strategies to reach them. The areas addressed are the organization's programs (performance, community outreach, education), management and governance (board of directors, advisory board, choir council, staff), facilities and technology (facilities, technology), marketing, development, and finance. In 2006, a select group of board members and staff gathered to review Singing City's progress regarding the 2004 goals.

Of the 19 goals established in the strategic plan, I have chosen five to examine.

#### **Performance Goal: Set and achieve new internal standards for performance excellence that others also recognize and emulate.<sup>12</sup>**

As of 2006, the organization recognized that they were gaining artistic momentum by including annual collaborations in their concerts. Meanwhile, they were planning to have a large work commissioned by Robert Maggio. Performance standards were also increasing because members were being asked to re-audition.

Somehow during this discussion, the thought of hiring an intern was brought up as a way to improve their performance goal. The thought of hiring an intern presented and dismissed as it was noted that the organization need an Assistant Conductor and the Music Director had no time for managing an intern. Later it is stated that Angela Scully also has no time to train an intern. During this 2006 meeting decided to create a new goal to **“Pursue an internship model**

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<sup>12</sup> Singing City - Strategic Planning Review Session. Prepared by Edward F. Swenson and Associates, Inc. 2006, 1.

**(artistic and arts management) that builds Singing City’s capacity while considering limited resources for oversight.”**

The result as of 2009, the collaborative concerts were elevated to annual events which were enjoyed by audiences. The collaborations however were becoming too common and the commission by Robert Maggio never happened. Singing City never hired an Assistant Conductor but rather associated this role with the organization’s accompanist. The choir never hired an intern to assist with music, but much later in 2010, the first administrative intern was hired.

**Outreach Goal: Overcome contemporary social, cultural, and political barriers by reaching out, opening minds and inviting greater exchange and interaction.**<sup>13</sup>

In 2006, the group noted that their audience is often more diverse than the choir. It was also noted that the schools program provides the primary source of funding for the organization, which provides music programs for schools without arts programs.

In 2009, talks began about a possible merger with an established children’s choir. The children’s choir was established as part of an outreach program in two of Philadelphia’s elementary schools, and Singing City’s board saw this as a way to achieve a quick increase in diversity while keeping with their mission of outreach and education. This approach was seen as a method by which to gain more funding in a dwindling economy. In 2010, the merger was finalized.

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<sup>13</sup> Singing City - Strategic Planning Review Session. Prepared by Edward F. Swenson and Associates, Inc. 2006, 4.

**Board of Directors Goal: Build the Board to reflect the diverse economic, cultural, and religious fabric of our region.**<sup>14</sup>

In 2006, the group recognized that they were not reaching their goal since only 2% of the board was not Caucasian. Diversity was apparent in the Advisory Board; however, the Advisory Board was completely inactive in the running of the organization. It is interesting to further read into the board's notes as it appears to be a conversation considering eliminating the idea of actively seeking diversity on the Board. Below are the points made as noted in the 2006 meeting:

- The diversity of Choir has diminished over time. We've been trying to address this objective for the last decade. Let's re-examine this objective. What we want is a good Board. By cultivating excellence, we are reaching our real goal. Diversity is a by-product.
- Alternate view- I'm not comfortable dropping diversity as a goal.
- Everything in the plan hinges on this point.
- We need this voice at the table.

The 2006 group then went on present a new goal: **Construct a more well-rounded, highly skilled, and flexible Board.**<sup>15</sup> To go about this, the organization decided to review gaps in skill sets and examine cultivating Board members by first determining the role of the Board. This new focus would coincide with increasing the Board's diversity and maintaining diversity is an integral part of the mission.

As of 2009, Singing City still had one non-Caucasian board member.

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<sup>14</sup> Singing City - Strategic Planning Review Session. Prepared by Edward F. Swenson and Associates, Inc. 2006, 7.

<sup>15</sup> Singing City - Strategic Planning Review Session. Prepared by Edward F. Swenson and Associates, Inc. 2006, 8.

**Marketing Goal: Develop and execute a three-year marketing plan that supports and actively promotes the mission, vision, and strategic initiatives of Singing City.<sup>16</sup>**

At the 2006 meeting, the issue of Board talent was addressed- they decided that they needed a person with marketing knowledge on the Board. It was determined that audience surveys being compiled by the Choir Administrator provided a wealth of knowledge for marketing, though it was not noted exactly what the surveys determined for marketing and to what extent they were ultimately overlooked. For some reason, the issue of parking and traffic were specifically noted.

As of 2009, a three-year marketing plan was still not formed. The organization continued administering surveys but stopped compiling them. Parking and traffic considerations, though valued by the audience, still made no difference in the determination of performance and rehearsal spaces.

**Development Goal: Create a five-year Development Plan that will provide a solid financial foundation now and support this strategic vision in the future.<sup>17</sup>**

In 2006, it was noted that there was a five-year Development Plan and that it continued to be followed- it was not noted how successful or not the plan was and exactly how they were following it. The organization acknowledged that it had always reached its annual financial goal. The suggestion of “identifying and obtaining the desired level of staff support required undertaking the development

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<sup>16</sup> Singing City - Strategic Planning Review Session. Prepared by Edward F. Swenson and Associates, Inc. 2006, 13.

<sup>17</sup> Singing City - Strategic Planning Review Session. Prepared by Edward F. Swenson and Associates, Inc. 2006, 14.



activities need to support this plan”<sup>18</sup> was noted but not discussed. At this time, a professional grant-writer was hired for each grant that was sent out.

As of 2009, there was absolutely no fundraising plan in effect. The same grant-writer continued to be contracted for writing grants; however, Lauren Anderson also began learning how to write grants and eventually took over this task as her own.

The details of these goals as laid out in the strategic plan are clear proof that the organization did have a set plan complete with the resources to realize these goals. The people running the organization, however, were treading water by not attempting fresh, new endeavors during a difficult time. This could be attributed to the turnover that occurred between 2008-2009, but I believe that it is due a lack of motivation on the Board., as there were little to no changes from 2004-2006 which would have been apparent if the strategic plan would have been followed.

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<sup>18</sup> Singing City - Strategic Planning Review Session. Prepared by Edward F. Swenson and Associates, Inc. 2006, 14.

### Chapter 3 – Indicators and Outcomes

Singing City was shown several indicators throughout fiscal year 2008-2009 and years prior whose outcomes of which could have determined the stability of the organization for future years. The organization was proactive at ensuring some indicators were handled in a way such that they had positive outcomes; however, there were many crucial indicators that were ignored or not dealt with at all.

I will recount the most significant indicators and outcomes, showing what warning signs were given, how they were handled, and how the negative outcomes could have been avoided.

**Indicator: Failing technology**

**Outcome: Loss of financial records and staff**

Singing City's computer system was outdated and managed by a board member at the time, Matthew Siverson, who was becoming more and more uninterested in his role. By the end of FY '09, Siverson became inactive in his role of handling information technology for Singing City.

At this time, Singing City owned three computers: one for the executive director, one for the office manager, and one for the choir administrator. In October 2008, the office manager's computer which housed all of the organization's financial and database information crashed. All information was completely lost. Already disgruntled by the change in executive leadership, the office manager at the time, Lisa Haun, left suddenly when the computer crashed. Some information was eventually recovered, including much of the database; however, since the organization was in the midst of administrative turnover, having recently appointed a new executive director and now being faced with hiring a replacement office manager, the decision to start anew was made. This

left the organization with gaps in their bookkeeping and with a large issue at hand when it would be time for the annual audit, which was eventually solved by many hours of reconstructing the accounts.

Singing City could have easily avoided losing financial records by paying attention to the warning signs the computer showed them and replacing the necessary computer parts. Even without upgrading software, Singing City would have benefited from backing up their files with an external hard drive, which they did in fact begin doing only after the computer crashed.

**Indicator: Poor executive planning**

**Outcome: Lack of funds**

One might consider it logic that having three executive directors within one fiscal year would make executive planning and follow-through difficult if not impossible. And so, it is no surprise that the executive planning within FY '09 was poor, and combined with the economic downfall, Singing City's funds were greatly affected.

The first and third executive directors of the year (Angela Scully and Lauren Anderson) were fiscally conservative, particularly Anderson who decreased wages to reflect the loss when she stepped into her role. However, the second executive director (Thomas Yarnal) acted frivolously by having elaborate dreams for the annual fundraiser. Granted, it was a great possibility that he was trying to prove himself capable of his newly appointed role, but it ended with a great loss in a time when funds were already low.

David Fishel has described executive leadership includes maintaining relationships within the community by communicating with donors, media, local governments, and providing leadership within the community while addressing

issues that are pertinent to that specific area.<sup>19</sup> Two of Singing City's executive directors during FY '09 were familiar with the Philadelphia area and donors for the specific organization. However, Yarnal came to Singing City without knowing particular high donors of the organization. He cultivated few to no new donors, leaving current donors with uncertainty as to whether to donate. This ultimately left the organization with over \$150,000 less in total assets at the end of the year compared to where it started its year.

This could have been prevented by making more fiscally conservative decisions, such as Anderson's major effort to save funds by cutting all positions' wages in half. Also, hiring an executive director without prior knowledge of Singing City's donors was a greater risk than realized by the hiring committee. Singing City is small enough that not knowing the crucial donors would certainly hurt the organization greatly, as it clearly did.

**Indicator: Administrators' personalities**  
**Outcome: More administrative turnover**

According to Michael Allison, one-third of all executive directors are first-time executive directors.<sup>20</sup> The two executive directors that were hired in fiscal year 2008-2009 came from different backgrounds. Thomas Yarnal had prior experience in being an executive director whereas Lauren Anderson had none.

This proves that whether or not a person has prior experience in being executive director, does not mean h/she will be successful. Though Yarnal had prior experience in this sort of role, his disposition and unprofessionalism left much to be desired. The catalyst of him being fired was the moment he

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<sup>19</sup> Fishel, David. *The Book of the Board: Effective Governance for Non-Profit Organizations*. 2nd ed. (The Federation Press, 2008), 55.

<sup>20</sup> Allison, Michael, "Into the Fire Boards and Executive Transitions." *Nonprofit Management & Leadership* 12, no. 4 (2002), 342.

announced the reduction of a position in a full staff meeting without first consulting with the person holding that position.

Carol Weisman noted different types of executive transitions that every executive director could be placed into. From her list, Thomas would be defined as the “Hanging by their fingernails” as he was presented with many problems at the beginning of his time with Singing City.<sup>21</sup> He was exposed to large financial, technological, and personnel issues, which can all be linked to his abrupt departure due to the way he handled these situations.

Preventing an organization from hiring an ill-fitting employee is difficult and may not have been preventable. In reviewing Yarnal’s resume, it is clear that his strength is in theater<sup>22</sup>, and the connection between his experience and working for Singing City was merely that fact that he had experience of working within non-profit organizations.

**Indicator: Lack of internal procedures**

**Outcome: Poor Planning**

Fishel also describes that an evaluation of staff should occur and assess how closely the organization is following the strategic plan and ask for a self-evaluation from the executive director. He goes on to note that the specific internal procedure of reconciling all bank accounts monthly and banking money promptly ensures internal integrity.<sup>23</sup>

Singing City had no official evaluation method and very relaxed internal procedures. My experience of observing staff evaluations was that the executive

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<sup>21</sup> Goldbaum, Richard and Carol Weisman. *Losing Your Executive Director Without Losing Your Way: The Nonprofit’s Guide to Executive Turnover*. 1st ed. (Jossey-Bass, 2004), 75-77

<sup>22</sup> Yarnal, Thomas. Personal Resume as of January 2008.

<sup>23</sup> Fishel, David. *The Book of the Board: Effective Governance for Non-Profit Organizations*. 2nd ed. (The Federation Press, 2008), 60, 129.

director was assessed by the board president, who in turn recorded that the evaluation took place on that specific day. I observed that the evaluation was a casual conversation which was more of a formality than an effort that should be taken seriously. There was a self-evaluation section, which Lauren Anderson did consider very serious and put much time into. As for the remaining administrative staff, they were evaluated by the executive director. Again, this was something that was more of a formality but offered no space for self-evaluation.

A thorough self-evaluation provides an organization with a sense of the inner-mechanics of the organization that one doesn't typically notice while in the midst of a busy season. When a self-evaluation is not taken seriously or is not studied, then its purpose is defeated. That is exactly what occurred with Singing City. In no way was the staff sufficiently evaluated enough to improve the internal function of the organization.

Regarding reconciling bank accounts and banking money promptly, I noted that throughout the 2008-2009 fiscal year, there were no accounts reconciled after Lisa Haun left in October 2008. Thomas Yarnal, Lauren Anderson, and the board of directors did not request this monthly process from the bookkeeper and treasurer. The accounts were finally reconciled in the Fall of 2009 when the organization was going through its annual audit. As for banking money promptly, this was a procedure that Singing City did often and diligently.

Evaluating staff and maintaining banking records is an effort that seems obvious, but in the midst of turnover and difficult economic times, these were protocols that were either overlooked or had not been already set in place. Surely using staff evaluations could have helped keep the organization on track with its strategic planning and finances. And certainly maintaining records and keeping

better track of finances could have helped raise a flag that the organization's operating account was being drained.

**Indicator: Not following the strategic plan**

**Outcome: Straying off-course, making it difficult for future leaders**

As stated by John Bryson, there are seven necessities for an organization to have if it wishes to successfully initiate the strategic plan:

8. A process sponsor(s) in a position of power to legitimize the process
9. A champion to push the process along
10. A strategic planning team
11. An expectation that there will be disruptions and delays
12. A willingness to be flexible about what constitutes a strategic plan
13. An ability to pull information and people together at key points for important discussions and decisions
14. A willingness to construct and consider arguments geared to very different evaluative criteria<sup>24</sup>

Singing City implemented many of these points made by Bryson: The process sponsor was Edward Swenson & Associates, a local consulting firm who facilitated planning sessions. The champion to push along the process was the executive director; the planning team was a selected group from the board of directors. The remaining points are debatable, but what can be noted as a fact was the group that met in 2006 to review the status of the organization's 2004 strategic plan were ineffective. Many points were noted they were "not discussed" and other descriptions are vague, for example:

Development Goal: Create a five-year Development Plan that will provide a solid financial foundation now and support his strategic vision in the future.

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<sup>24</sup> Bryson, John. "A Strategic Planning Process for Public and Non-profit." *Long Range Planning* 21, no. 1 (1988), 80.

1. Develop a five-year rolling fund-raising plan that eventually provides for the Executive Director's salary and current planned marketing initiatives as well as future program growth.

*Notes: a. We have a plan and continue to refine it and focus on implementation*

*b. We have been successful with the annual goal*

2. Identify and obtain the desired level of staff support required to undertake the development activities needed to support this plan.

*Notes: a. This was not discussed.<sup>25</sup>*

Singing City would have benefited greatly from thoroughly examining its strategic plan, which would have shown the staff that they were in a stagnant phase. This would have been an ideal time to put the organization on track and pave the way for the unforeseen transitions in 2008.

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<sup>25</sup> Singing City - Strategic Planning Review Session. Prepared by Edward F. Swenson and Associates, Inc. 2006, 14.



## Chapter 4 – Recommendations

With all the errors that were made in the operation of Singing City from fiscal year 2008-2009, there were also many positive actions made. In implementing just a few key points, Singing City would greatly improve the function of the organization as a whole, should it consider the following:

First, I would suggest that the organization be extremely careful and make large decisions more cautiously. The organization has already learned this lesson since the hiring and firing of Thomas Yarnal. It is important to keep in mind that no matter how much research and caution you put into a decision, the choice may not be a good fit for the entire organization. However, I do think this misguided hiring could have been prevented based on a more thorough study of his background and considering his unfamiliarity with Philadelphia. I would suggest that the personnel committee be expanded to include long-standing members of the organization who have great consideration for the mission at the forefront of their mind and non-profit experts who are familiar with how a non-profit organization should operate and what aspects should be considered, including development and marketing efforts. By bringing these two types of opinions to the personnel committee, the organization would have the voice of the organization and the voice of knowledge.

Next, I would suggest that the staff not ignore problems when they arise. Surely the computer was showing signs that it would crash and surely someone had noticed that the strategic plan was not being followed, yet no efforts were made to correct either. To prevent this same situation from happening again, Singing City should hire an objective individual to make an evaluation of the organization every six months, as I believe the current staff and board is incapable of being completely objective of this organization since they are all so invested. This objective consultant should be familiar with how non-profit choral

organizations operate and make suggestions on development, marketing, strategic planning, internal functions and board/administrative connection. More important than having an objective person make suggestions is that the organization should enforce ways to improve its function and diligently implement them.

My final suggestion is for the staff to consider Singing City to be a serious business. Too many things have been left to fall to the wayside, leaving the organization in a difficult situation on many levels: financially, administratively, and structurally. Singing City was founded on the principle of unity through choral music, and the mission is still applicable to society today. The organization has great potential to thrive, yet this paper strongly suggests that a handful of poor decisions can cause serious damage and potentially force an organization to fail. No one can tell what would have happened to the organization had the board not removed Thomas Yarnal, but judging from his track record, it would not have been positive.

Having worked at Singing City for two years, the organization is very near to my heart. To learn all that occurred prior to my time there and to have played a large part in the rebuilding of the organization left me infuriated. It is my ultimate hope that the organization will take my observations and recommendations seriously as it goes forward.

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## In Attendance

### Board and Staff Members

Jeffrey Brillhart  
Bill Krewsen  
Linda Madara  
Bob Phillips  
Angela Scully  
Bill Thompson  
Claire McKinley  
Ellen Anderson  
Marnie Hague

Julie Friedman  
Lynn Simensen  
Mike Smith  
Liz Haslam  
Carolyn Lowery  
John Immerwhar

### Facilitators

Jennifer Shropshire  
Ted Swenson

## I. Discussion of Progress toward Strategic Goals

The Board discussed Singing City's strategic plan section by section. Individuals with the most information about sections of the plan shared current activities and successes as well as trials and tribulations. The group discussed ways to advance objectives.

### Performance

**Goal: Set and achieve new internal standards for performance excellence that others also recognize and emulate.**

1. Continue to develop and implement programming that distinguishes Singing City as an outstanding, unique, and internationally recognized Choir.
  - *We've had an influx of energy. Examples: Winter Concert, collaborations with young choirs, attracting different audiences, and the composer competition.*
  - *WHYY is airing a two-hour broadcast of Singing City at the end of the month.*
  - *We are commissioning Rob Maggio to do a major work. We are trying to get an individual to sponsor commissions and will provide them with a naming opportunity. We need increased visibility in order for this to be successful.*
  - *Sing in Sing Out will be held January 2007.*
  - *We're becoming known for ongoing collaborations, especially unpredictable partnerships.*
  - *The concert this month is a partnership; ongoing partnerships are difficult to sustain, however, this is the ultimate goal. We need to align our goals with the partners' goals. Specific questions: working with the Philadelphia Singers as their budget is reduced; can we work with the Holocaust group again?*
  - *School partnerships are sustainable because we are very flexible. Also, the model is organic, dynamic and long-lasting. It's taken us since 1996 to get to this point.*

## I. Discussion of Progress Toward Strategic Goals (continued)

2. Develop the choir talent, technically and musically.
  - *Jeff listened to parts of all of the Singing City concerts since 1988. He reports that the Choir's artistic progress is strong and very audible. The Choir also learns the repertoire much more quickly than in the past.*
  - *All of the women have been re-auditioned. The men will be re-auditioned in May.*
  - *This objective is one of the biggest challenges because it requires a lot of resources e.g., section leader, training programs, working with the Orchestra needs a minimum of two rehearsals.*
  - *The 2007 season is all new music so it will be a steep learning curve for the Choir. We ought to invest 50% of what we currently do in the Orchestra to get where we want to be.*
  - *The venue is a factor. The recordings have to be excellent. This affects decision-making because venues are contingent on funding.*
  - *What are the priorities?*
  - *Getting an intern has been redirected because we really needed an Assistant Conductor. Interns are needed for special projects, but they require management and Jeff does not have much time for this. Also, there is a question if the internship program is about developing resources for the organization or educating people. Is there a different way to touch young conductors and expose them?*
    - *Founders Day*
    - *Working with college departments to get preservice teachers to self select, develop a feeder stream, and create opportunities for student teachers for conducting.*
    - *Winter Concert*
    - *Invite them to come to concerts throughout, not just the one where they are conducting a piece.*

*There's still a question of supervision though. We need to create a model that is dynamic and experiential. It should include criteria and performance expectations. Liz spoke about an on-line training program that seems consistent with the type of outreach and collaboration that we want to impart. Moreover, the Choir needs to understand that this is a mutual learning opportunity.*

*When considering an Arts Management Internship, we run into the same issues with Angela's time. We need to see if can free up some of Angela's and Jeffrey's time (otherwise the organization won't grow). Can we leverage others like trained musicians to be resources? We need to be sure that we tell interns who they will be working with.*

## I. Discussion of Progress Toward Strategic Goals (continued)

**Major Next Step:** Pursue an internship model (artistic and arts management) that builds Singing City's capacity while considering limited resources for oversight.

3. Position the Choir to be prepared for performances with major orchestras and artists.
  - *We are developing Tour 2008 and are considering a mini-tour to Miami.*
  - *Working with major artists is ongoing. We had performance collaborations with Brubeck and Rilling. Anton Armstrong and Adre Thomas were strong education partners. All attracted new audiences.*
  - *We are providing opportunities for emerging artists.*
  - *Planning for the Elaine Brown Center is in our minds.*
  
4. Take a leadership role in the arts community and in building a choral consortium.
  - *Developing the Consortium might take more time than we have. It must happen, however, if we're serious about having a choral festival in 2010. The concept is: 100 years, 100 choirs, one voice.*
  - *The joint brochure with three other choirs was a major step and is viewed as helping all organizations. We need to meet regularly to align goals.*
  - *Of all of the area's choirs, the team of Angela and Jeffrey is the one who has stayed fully intact. Accordingly, Angela and Jeff are the ones in position to be the leaders in developing the Choir Consortium.*
  - *Working with American Composers Forum has helped enhance the mentorship program; it's healthier with defined outcomes. Also working with the American Composers Forum on an awards program.*
  - *We haven't fully brought people together to further an artistic community. It's an interesting concept, but what's the real value? Conductors and artistic directors do meet every spring.*
  - *Financial credibility goes hand in hand with artistic credibility. The artistic credibility might be slightly ahead of the financial credibility at this point. We're starting to be invited to opportunities.*
  - *With the support of WHY?, a DVD of the history of Singing City is scheduled to be completed in 2007.*
  - *"Prove that we are more valid" sounds preachy. Surveys are demonstrating that audiences come for the music and stay for the mission.*
  - *We understand who we are and are authentic.*

## I. Discussion of Progress Toward Strategic Goals (continued)

### Community Outreach

**Goal: Overcome contemporary social, cultural, and political barriers by reaching out, opening minds and inviting greater exchange and interaction.**

1. Create a more racially, culturally, economically and generationally diverse choir and board, with an equally diverse audience.
  - *Sometimes the audience is more diverse than the Choir. Some of this can be attributed to the curriculum in the schools (e.g., the Choir needs people who can read music) or an expectation of singing gospel. Also, there have been challenging while working with a variety of partners in terms of communication and style.*
  - *Some believe that diversity is going to come from institutional partners, not individuals.*
2. Maintain and develop our collaboration with underserved communities.
  - *Every partnership is a leap of faith and Singing City is learning to work on developing a shared view of how to move forward with each partner.*
3. Work with a community organization to develop a “showcase” partnership that extends beyond performance.
  - *This is primarily the work in the schools.*
  - *The Winter Concert is a forum for demonstrating ongoing collaborations.*
4. Extend the pioneering tradition of Singing City by taking our commitment to bridge conflicting communities nationally and internationally through tours and service.
  - *Determining where to tour and how the Choir will “be” in the country is a serious discussion.*
5. Use leading edge technology to communicate with new constituencies.
  - *This was not discussed.*



## I. Discussion of Progress Toward Strategic Goals (continued)

### Education

#### Overview Thoughts:

- *The education program gets at the heart of Singing City being inclusive. It's not about setting up walls and barriers. It's about enlightening, engaging people in new kinds of self-expression, bonding, and new learning. Steve Fisher our Schools Workshop Director is world class in this regard. He invites people to join in and succeed no matter their skill level.*
- *The education program seems to be the primary vehicle for funding Singing City.*

**Goal:** Use multidimensional approaches to stimulate, release and engender creativity and universal human expression for people of all ages.

1. Establish a relationship with a school in another urban area in the region such as Camden, New Jersey.
  - *Singing City is spending the entire year at Stanton School. It's a holistic approach and is lasting more than 14 weeks. It's not a "drive by" and helps prepare the School for the Winter Concert.*
  - *We are providing a continuum of services including giving students and their family tickets to concerts, providing transportation, and have changed the final concert so that it's more about the kids and less about Singing City. The newsletter supports this switch in emphasis. Someone suggest that in the future, season subscribers be invited to attend the final sharing session.*
  - *The profile of Singing City in the Schools is increasing. The website helps makes the program visible to other schools, which are seeking this type of model.*
  - *Children are hungry for this programming. In general, the teachers aren't, so there is an application process that helps guarantee that the participating teachers are engaged in the process.*
2. Solidify the Singing City Prize for Young Composers as an eagerly anticipated annual, nationally recognized event and as an integral part of the mission of Singing City
  - *The prize enables us to have a more far reaching effect. They are like young interns, ambassadors for Singing City.*
  - *We are expanding the prize nationally and getting applications from across the country. This is a great example of using the website well.*
  - *Aim for a national sponsor.*
  - *Work with schools in Philadelphia does have links to funding.*
  - *We've asked individuals to endow the prize for a naming opportunity. To date, however, at \$400,000 the cost is prohibitive.*



## **I. Discussion of Progress Toward Strategic Goals** (continued)

3. Develop long-term collaborations with other choral education initiatives such as West Philadelphia Children's Choir and other regional, national, and international children/youth choirs.
  - *West Philadelphia Children's Choir just hired Steve Fisher and Bobby Willig to be directors.*
4. Redefine and implement choral education and performance programs for older adults.
  - *This was not discussed.*

## I. Discussion of Progress Toward Strategic Goals (continued)

### Board of Directors

**Goal: Build the Board to reflect the diverse economic, cultural and religious fabric of our region.**

1. Elect people who represent a range of economic, cultural and religious backgrounds on the Board.
  - *We are not meeting our objective – 2% of the regular Board are not people of color.*
  - *Challenges – cultural differences? Available time?*
  - *Diversity is happening on the Advisory Board, which is 85% African-American and 5% Asian.*
  - *What can we do to get Advisory Board members on the regular Board?*
    - *Let's invite them to come to the next retreat.*
    - *Many live out of the area though can we do a video teleconference?*
  - *Recruit people of color to the Board by giving them targeted assignments.*
  - *Ask several people at a time.*
  - *The diversity of Choir has diminished over time. We've been trying to address this objective for the last decade. Let's re-examine this objective. What we want is a good Board. By cultivating excellence, we are reaching our real goal. Diversity is a by-product.*
  - *Alternative view – I'm not comfortable dropping diversity as a goal.*
  - *For some people, diversity is fundamental to Singing City's mission.*
  - *Everything in the plan hinges on this point.*
  - *We need this voice at the table.*
  - *Bill Thompson has been active in approaching the Asian community. Each person has to take on a specific assignment of seeking out folks.*
  - *We need champions of different areas: people of color, people with name recognition, people who are wealthy enough to support carrying out diversity at the programmatic level.*
  - *Why aren't we attracting people of color?*
    - *We need to conduct exit interviews for people who've left the Choir or the Board.*
    - *What's the value of being on the Singing City Board to them?*
  - *Be upfront with the struggles that we've had.*
  - *Ask someone to be an "observer" rather than a full Board member?*
  - *Get ideas to Bill Thompson.*

## I. Discussion of Progress Toward Strategic Goals (continued)

**Major Next Step:** Clearly, this is an issue that needs to be resolved. The Board needs to determine whether or not it should make seeking a diverse Board a priority. If so, it will need to develop more creative strategies. The Board Nominating Committee was charged with coming to the Board with a report to get the Board moving on this issue.

**Goal:** Construct a more well rounded, highly skilled, and flexible Board.

1. Provide additional depth of skills to the marketing, fund development, finance, and real estate development areas.
  - *We need to review gaps in skill sets on a yearly basis.*
2. Develop a “pipeline” (i.e., a stream of potential talent) for the Board by cultivating people with needed skills and involving them in the work of the committees and the programs.
  - *We need to rethink the role of Board members overall:*
    - *We need to be specific about what we want people to do.*
    - *Have them focus on a project as opposed to joining a committee.*

### Advisory Board

**Goal:** Build the Advisory Board as a vehicle for broadening Singing City’s network, raising its visibility, and enabling it to become a savvy participant in the regional, national, and international cultural communities.

1. Recruit high visibility artists, business professionals and significant mission contributors to the Advisory Board for a total complement of at least 12 members.
  - *Recruiting members to the Advisory Board has been quite successful.*
2. Recruit people who represent a range of economic, cultural, and religious backgrounds.
  - *This was not discussed more in depth.*
3. Engage Advisory Board members, twice a year, by offering content-rich meetings that include a social element.
  - *This was not discussed more in depth.*
4. Design activities for each Advisory Board member to deepen his or her relationship with and contribution to Singing City.
  - *Invite the Advisory Board to participate in the next retreat.*

## I. Discussion of Progress Toward Strategic Goals (continued)

### Choir Council

**Goal: Enhance the Choir's self image and focus on musical excellence and commitment to outreach efforts.**

1. Nurture and cultivate leadership within the Choir Council.
  - *Some younger, newer members are joining Choir Council.*
2. Add more mechanisms for Choir input and feedback to leadership, staff and Board.
  - *Observing Board sessions continues to be a good experience.*
  - *Choir Council members are participating in the Artistic Program Committee in particular.*
  - *Having the Board President being a member of the Choir has been very helpful.*
3. Increase and improve opportunities for Choir members to refine their musical abilities.
  - *They haven't started planning summer sight reading workshops yet. Angela has been looking for funding.*
4. Provide more opportunities for Choir members to participate in artistic and educational activities as well as in Choir Council activities.
  - *Volunteerism has changed. The Choir Council still struggles with involving people beyond singing, but has been successful in bringing new people into these roles.*
  - *Choir Council is looking to create a day of service for the Choir on MLK Day. This is a great way to combine the mission and the music.*
    - *Linda has a contact with the President of Saunders House.*
    - *Suggestion to work with Germantown Oratory Choir*
    - *Suggestion to work with Main Line Gospel Choir*
  - *The focus of the Concert Committee is now about selling tickets. Accordingly, an action step about increasing individual involvement in concert planning isn't needed going forward.*
  - *They are trying something different and going to Ocean City.*
5. Improve mechanisms for communication among the Choir membership and between the Choir and other entities such as the Board and Singing City's collaborators.
  - *The Choir Council has been doing a lot to refine orientation. The costs of running the Choir have been more transparent and they want to continue emphasizing how expensive it is "It costs \$3,000 for you to be in this choir."*

## **I. Discussion of Progress Toward Strategic Goals** (continued)

- *Historically, choir members did not attend the annual meeting because it was held before a rehearsal. This year, it was held in the middle of rehearsal, which made it a great opportunity to talk about the Strategic Plan, introduce Board members, and be sure that a lot of information was being received by choir members.*
- *Elaine has been very attuned to including articles such as the article by Bobby Willig in Chorus Lines.*
- *The newsletter is now available in print and on the website.*
- *John has been compiling notes on choir members himself in order to ensure that this happens. John also is adding other fun elements to the publication.*

### Staff

**Goal: Continue to grow and develop a professional staff that supports the expanded programs of Singing City.**

1. Clarify and formalize roles, functions and interrelationships among Staff, Board, Choir and Choir Council
  - *It's a small organization so changes in staffing have been difficult, but also have provided a lot of opportunities. We've refined the job descriptions.*
  - *The Personnel Committee assisted by sitting in on interviews.*
  - *We need to make sure Board gets Chorus Notes.*
  - *We continue to have an annual summer staff retreat.*
  - *Angela is trying to be a more proactive versus reactive person (difficult given lack of time and the limited staff).*
2. Evaluate staff requirements and develop, fund and implement a three-year staffing plan.
3. Provide a competitive salary and benefits package to staff.
  - *Chorus America provides a lot of good statistical information in this regard.*

**Major Next Step: Personnel Committee to develop a multi-year staffing plan.**



## **I. Discussion of Progress Toward Strategic Goals** (continued)

### Facilities

**Goal: Provide flexible and accessible space for the staff to work, for the Choir to perform and rehearse, and for our community to gather.**

1. Perform a needs assessment and identify the components of an ideal interim space for Singing City (office, music library, rehearsal and performance).
2. Develop a Board-approved project plan for resolving space needs.
3. Identify and secure satisfactory interim space for the organization.
4. Identify and maintain a preferred short list of appropriate and feasible venues, with detailed attributes and deficiencies, for formal concert performances in and around Philadelphia.
  - *The concert at Irvine Auditorium was a tremendous concert, but eye-opening in terms of working with union expenses. Can we afford to remain in the city or will we need to move to the suburbs?*
  - *Greater Philadelphia Cultural Alliance helped us explore new venues, but we have gone back to our traditional venues in the meantime.*

**Goal: Lay the groundwork for securing a permanent home for the “Elaine Brown Center for Choral Music.”**

1. Determine criteria and specifications for an ideal space.
  - *There was a meeting with a collection of advisors. The suggestion was for Singing City to stay at its current location and improve it until funds are available to move to a new home.*
2. Recruit and launch a project development team, including professional consultants.
3. Develop and approve a seven to ten-year plan to purchase, renovate/construct, and move into the identified property.

## I. Discussion of Progress Toward Strategic Goals (continued)

### Technology

**Goal:** Enhance the infrastructure in order to enable more effective tracking, management, and communication with stakeholders.

1. Upgrade office technology and software to facilitate staff work.
  - *We have done fairly well technology upgrades. We have upgraded the printer and also are able to share files.*
  - *We need to continue with training so that staff members know who to use all of the systems.*
  - *We're still small shop so a lot of available programs are more than we need. Lynn will supply the name of good integrated system.*
2. Make the web site the primary means of internal communications for staff, the Choir and the Board.
  - *We have to do some work on the Board page of the website to get password access so we can post the minutes and other documents on line. We are considering moving to professional oversight of the website.*
3. Develop financial plans and projections in support of the strategic plan initiatives and proposed capital campaign.
4. Establish the web site as a viable networking, marketing and communications tool for the organization to relate to the public and other external constituencies.
  - *We have been promoting the competition via the website and are tracking applications with the database.*
  - *The website does enable people to sign up to be on the e-mail list when they click for more information.*
  - *Surveys indicate that people like the e-notes.*

## **I. Discussion of Progress Toward Strategic Goals** (continued)

### Marketing

**Goal: Develop and execute a three-year marketing plan that supports and actively promotes the mission, vision and strategic initiatives of Singing City.**

1. Define Singing City's marketing goals, objectives, and tactics, including the development of new and innovative strategies for audience development, public and media relations, and communications.
  - *We need new talent on the Board to move this area forward. Geordi cannot do it all.*
  - *Singing City's audience surveys have done a lot to inform marketing initiatives (e.g., we know that WRTI is a good way to advertise, most of our audience members come from the suburbs). A seminar led us to use the same questions on the survey disseminated at every concert, which has been very helpful.*
  - *Elaine writes a good report on survey data after every concert.*
  - *We're working on audience development and learning that the combination (versus a single strategy) of all of the strategies (flexible subscriptions, allowing ticket buying via e-mail, the website, and collaborations) is successful.*
  - *Parking and traffic are hurdles.*
2. Build the Board and a volunteer base focused on marketing efforts.
  - *See above. We need to build this committee.*

**Goal: Raise Singing City's visibility and clarify its public image.**

1. Develop and implement techniques that market the mission rather than each concert or event, including continuing to enhance the branding program.
2. Build relationships with regional, national and international constituency groups and communities.
3. Take advantage of existing advocacy and capacity building organizations to raise Singing City's profile.
  - *Angela and Jeff are speaking at the Chorus America Conference in D.C. on the topic of evolving from a founder-driven organization.*
4. Develop and execute a press and media relations plan that generates more active coverage of Singing City's performance, outreach and education efforts.



## I. Discussion of Progress Toward Strategic Goals (continued)

### Development

**Goal:** Create a five-year Development Plan that will provide a solid financial foundation now and support this strategic vision in the future.

1. Develop a five-year rolling fund-raising plan that eventually provides for the Executive Director's salary and current planned marketing initiatives as well as future program growth.
  - *We have a plan and continue to refine it and focus on implementation.*
  - *We have been successful with the annual goal.*
2. Identify and obtain the desired level of staff support required to undertake the development activities needed to support this plan.
  - *This was not discussed.*

**Goal:** Cultivate and steward the donor base to increase funds raised each year.

1. Outline and implement strategies to expand the donor base substantially beyond the Choir and the Board, including subscribers and community supporters.
  - *Fund raising approaches reflect a change in perspective. The emphasis is more on the "mission" side than the "artistic" side.*
    - *Reach the individual through emotion. Talk about making a positive difference in someone's life.*
    - *Most of Singing City's press is around the composers prize and work in the schools.*
    - *We get funding to give a lot of tickets away*
    - *We need to be able to show people what the organization is. The DVD will be great in this regard.*
    - *We need to change people's perceptions and it has to be through experiences, not words. It needs to be a multimedia presentation perhaps a four-minute clip. People have to be at the concert in order to experience this though.*
  - *Is something missing in our committee structure? There is no "Mission Committee."*
  - *The opportunity for attracting more support is grounded in "the mission piece." We need to get better at integrating the mission and the music so that the Brahms Requiem concert will have the same impact as the Winter Concert.*

**Major Next Step:** Artistic and Marketing Committees to work on integrating "the mission" and "the music" at every concert in order to expose concert-goers to outreach and educational programs.

## **I. Discussion of Progress Toward Strategic Goals** (continued)

2. Build the major gifts program (\$10,000+ gifts), including reengaging potential major donors through personal contact and small events, and identifying and cultivating new prospects.
  - *We have talked for several years about developing a list of prospects, but it has remained stagnant. We need new prospects as we are overwhelming our historic donors. We need to leap to a different level.*
  - *We need Board training in this area.*

### **Goal: Build the endowment to \$1 million.**

1. Expand the existing Planned Giving program beyond accepting bequests to promote and enable other financial vehicles to contribute to the growth of the endowment.
  - *Planned Giving was not discussed.*
  - *We are meeting the initial goal for the endowment; the Board has raised the seed money for the endowment.*
  - *We are anticipating some donor conflict with giving to both the annual fund and the endowment and are trying to forestall this. In the long run, the endowment is most important to Singing City's stability, but we don't want to get away from supporting day to day operations.*
  - *We need to figure out how to involve all of the Board in the next level of raising funds for the endowment. We have been trying to focus on prime candidates, but this is restrictive.*

### **Major Next Step: Endowment Committee to continue solicitations.**

## **I. Discussion of Progress Toward Strategic Goals** (continued)

### Finance

**Goal: Lead initiatives to ensure financial security and stability.**

1. Establish a financial model and three-year rolling budget that supports implementation of the artistic, organizational, and facility and systems goals as outlined in the strategic plan.
  - *We are processing and accounting for funds well.*
  - *We're currently looking at different opportunities for investment and assessing investment strategies.*
  - *We do have a written investment policy.*
  - *We are looking for a new investment advisor who feels that our goals for socially responsible investing can be accomplished.*
  - *We just short of \$200,000 in cash in the endowment currently. Total outstanding pledges are \$318,000 so we are one-third of the way toward our goal.*
  - *In terms of budgeting, the Finance Committee is working more in collaboration with the Artistic and Marketing Committees. We are being more realistic and are looking at monthly cash flow, especially given that the STI (has been depleted. The STI has been great for getting us through the transition.*

## II. Milestones

The 60<sup>th</sup> Anniversary of Singing City will happen in 2008. The 100<sup>th</sup> Anniversary of Elaine Brown's birth is 2010. Ted and Jennifer asked the group to discuss the pros and cons of celebrating one or both of these milestones.

Comments were as follows:

- These milestones are opportunities versus causes. Start with the substance of what we would do, not with a marketing perspective.
- We've been trying to get away from falling into founders syndrome. Shouldn't we highlight the milestone that celebrates Singing City as a whole?
- Singing City Singing City can be perpetuated. Elaine Brown less so.
- On the other hand, we're always looking for the personal touch and people really connected with Elaine Brown.
- Can we do a really special Founders Day to celebrating Elaine's 100<sup>th</sup> birthday?
- If we don't do a tour in 2008, we won't have a mutiny, but a tour is a bonding experience and it helps with retention. A mini tour would help. In either case, we need to include choir members as well as alumni.
- We need to consider the resources we have available to us, what's going to bring us the visibility we want, and the level of energy we have to pull off activities. We need to answer the question – who's important to reach when?
- We need synchronicity; milestones must be an integral part of all discussions.
- The tour and the festival would have two different funding sources.
- Hosting a Choral Festival in 2010 requires a lot of time to plan. We're not sure that we could do it by 2008 so that's not really an option. Also, it requires advance commitment not only for organizing, but also for funding applications. Pew is a potential funder and note that Pew funds would be for artistic excellence, not outreach/education. Proposed activities for a Choral Festival include:
  - A capstone performance (Singing City)
  - Mass choir events
  - Workshops like "How to Conduct a School Program"
- Let's hold a Peace March. This also illustrates Elaine Brown's legacy.
- For the 60<sup>th</sup> Anniversary, let's do a tour, a season of concerts that are not arcane, but would be funded through ticket sales. Make sure that the season is attractive, with street appeal that supports a clear and consistent brand for the season.
- Have an activity/concert/initiative that links to the festival.
- Is the Choral Festival one and done? Or something to be replicated? We need to decide upfront because it makes a difference.
- We need to fix the "music versus mission" disconnect discussed earlier.
- We don't want to lose the opportunity of the 60<sup>th</sup> anniversary.
- Let's not dawdle in getting started, but we need to plan carefully.

**Major Next Step:** Create a task force dedicated to this topic, but also make sure that plans are coordinated with all aspects of future planning.



### III. Succession Planning

With the intent of helping Singing City be as comprehensive and thoughtful as possible as the organization continues to implement and refine its Strategic Plan, Ted presented a number of questions for the group to consider:

#### For the Individual:

- How to give him or her permission to leave the organization?
- How to best recognize his or her contributions for the organization? For them?
- How to assist with life/career planning?
- How to assist with the psychological loss of power/purpose?

#### For the Organization:

- How to prepare for the transition? Distinguish between emergency versus planned transitions.
- How to assess organizational needs such a Board, infrastructure, contacts, and institutional memory?

Comments from the group were as follows:

- Singing City has experienced this before at both the staff and Board level. We can learn from what this has taught us.
- We need to make efforts to ensure that there isn't a change in leadership.
- We need to talk about organizational change more at the Board and Board-staff level. The more we acknowledge and discuss change, the more comfortable we are with it.
- Let's build a model that plots out the right way to deal with staff.
  - Recognize Angela and Jeffrey for their efforts.
  - Consider not only recognition, but the challenges and compensation.
  - Jeff is going on sabbatical from Bryn Mawr Presbyterian. Singing City needs to anticipate and accommodate this.
  - Now we only have an engagement letter. Create a multi-year contract to avoid non-planned departures except for real emergencies. Coordinate the timing of the contract with the season; the window for making a change is June through September.
  - We now have a Deputy Director who can fill in. Make it so that this position is held by the next probable successor.
  - Ensure that Singing City's stature is high so that there is a huge pool of applicants if and when we need to do a search.
  - Don't have a cult of personality. Make sure that each person understands the impact of his or her leaving the organization.
- We do have job descriptions for paid staff.

### **III. Succession Planning** (continued)

- Key people are leaving at the Board level.
  - Conduct exit interviews with Board members.
  - Develop job descriptions (versus expectations) for Board members. This will make it easier for new people to assume responsibilities.
  - Give every Board member the Myers-Briggs test in order to identify gaps on the Board and target recruitment of new members.

**Major Next Step:**     **Have the Personnel Committee and Board Nominating Committee explore these issues further. Note: these issues are applicable to Choir members as well.**

# Thom Yarnal

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Manager with diverse nonprofit, arts, and teaching background. Project management, systems development, and communication strategies for arts and human service related businesses. Successful record of enlisting financial and volunteer support for nonprofits.

## Management Experience

### **TOVA**

Philadelphia, PA

**GENERAL MANAGER** – Responsible for day-to-day operations of social advocacy theater with \$400,000 annual income. Sole responsibility for marketing, public relations, and fundraising. Established and maintained relationships with the School District of Philadelphia, state legislators and corporate arts supporters. Regional tour management, and community outreach through the Blueprint for a Safer Philadelphia.

### **Pinewoods Camp, Inc.**

Plymouth, MA

**GENERAL MANAGER** – Historic conference facility with \$625,000 operating budget. Responsible for accounts payable, ordering supplies, managing camp store and logo sales, customer service for twelve rotating nonprofit groups of 145 participants, and assisting with human resources for 24 seasonal employees and volunteers.

### **Gretchen's House**

Ann Arbor, MI

**MARKETING CONSULTANT** – Developed marketing and PR strategy for chain of childcare facilities with a \$6.5 million operating budget. Unified corporate message and image across all media. Identified and developed networks for expanding brand recognition. Guided selection of community event participation and non-profit philanthropy goals.

### **Attic Theatre**

Appleton, WI

**EXECUTIVE DIRECTOR** – Managed community-based theater with a \$350,000 operating budget and four full-time staff. Responsible for all aspects of seven-play subscription series. Created annual and endowment fund campaigns and wrote an average of \$75,000 in funded grants annually.

### **Edwin Schlossberg, Incorporated**

New York, NY

**OPERATIONS MANAGER** – Coordinated global client presentations, managed fabrication of exhibits, researched special projects, organized capital improvements, and supervised support staff for large museum exhibit design firm.

### **Presbyterian Church (USA) Foundation**

New York, NY

**MANAGER, GIFTS AND BEQUESTS** – Administered \$12.3 million gift annuity program and \$4.6 million investment management service for the national church. Created annuity agreements, donor tax reports, quarterly statements for trustees, and coordinated international donor services.

### **Theater of Nations**

Baltimore, MD

**COMPANY MANAGER** – Organized 200 volunteers and staff of 30 to provide services to 245 performers from 12 countries giving 88 performances in 14 theaters over a two-week period.

## Education

M.F.A. – Directing  
B.A. – Theater  
Certificate in Planned Giving

Brooklyn College, C.U.N.Y. 1985  
King's College 1976  
Philanthropy Tax Institute

Brooklyn, NY  
Wilkes-Barre, PA  
Old Greenwich, CT