

Strategic PLAN 2020-25

*Framing
Our Future*

.....
Transforming lives through
the power of singing.



Teaching Performance Scholarship Research





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From the President



Many voices, one passion—singing!

The National Association of Teachers of Singing Strategic Plan marks a point in our seventy-five-year history when, for the first time, we are formally and fully examining all aspects of who, what and where we have been since 1944, and how to build toward the future. As we honor the original 100 founding members of NATS and all members in our history, we are in awe of the original creativity and innovations that have advanced us to this point.

In 1944 the founders of NATS relied on hand delivered mail and telephone calls. As we do today, they kept abreast of vocal pedagogy trends through annual conferences and mailings of the *NATS Bulletin*, now called *Journal of Singing*. They also held annual meetings with the Board of Directors to discuss matters for the good of the association. It is impressive that so many of their original ideas are thriving into the twenty-first century. Collectively NATS members, past and present, have shared a respect for the singing of each individual person. This crosses the boundaries of time. However, our history will always reflect the constant changes of the times we live in.

Today 40 percent of our members teach in academic institutions, 40 percent are independent teachers, and 20 percent are from other areas including professional singers, arts administrators, choral directors, collaborative pianists, medical professionals, professional voice therapists, students, and K-12 voice instructors. Now our members are, and may work with, singers of all genres, all gender identities and all ages. They have instant access to repertoire, translations, IPA, history, audition registration, 3-D imaging of the vocal tract, larynx and the entire body, and the latest advancements in voice research and science. NATS can hold virtual meetings that include many members within chapter, regional and national levels. NATS has hundreds of sessions available to its members in the Live Learning Center, online audition registration, new mentoring initiatives and our own *So You Want to Sing* book series.

The Strategic Plan itself is a living document with a great deal that will be addressed in ongoing processes that will have fiscal ramifications and require careful financial and action planning. With this Strategic Plan we offer an update to our mission and add our vision, values and a diversity and inclusion statement, none of which previously existed.

What we need now from our members is your goodwill, volunteerism and involvement, ethical and excellent work with singers, financial support beyond dues, and your ideas in the best interests of our future together as an association.

I hope our work together will resonate now, and in the years ahead!

A handwritten signature in blue ink that reads 'Karen Brunssen'.

Karen Brunssen, NATS President



Executive Summary



This Plan provides direction for NATS to determine priorities, evaluate performance, make key decisions, and increase financial resources, providing a framework for the coming years. This Plan is an investment by NATS to develop healthy resilience needed to advance growth, navigate challenges and change, sustain and deepen programs, and develop relevant opportunities for members. Successful implementation of the Plan will support NATS' ability to effectively deliver its mission to support members as a primary world-class professional resource.

Research

NATS conducted research throughout 2019, beginning with a membership-wide Climate Survey. Survey results were positive regarding NATS mission, level of member engagement, and emotional commitment by members. The survey identified areas in need of attention and improvement.

More than fifty NATS leaders and volunteers participated in a SOAR assessment to identify strengths, opportunities, aspirations, and results. A Strategic Planning Task Force was recruited from all segments of our membership. Using the valuable resources of the SOAR assessment and the Climate Survey, their discussions provided essential input leading to the NATS' mission, vision, values statements, two primary goals, and five key focus areas in the Plan. The NATS Strategic Plan 2020-2025 was approved by the NATS Board of Directors at their mid-year national board meeting February 16, 2020.

Our Critical Focus Areas NATS has chosen the following goals and five key action areas on which to focus:

GOAL I:

Advance the standing of NATS as the preferred professional organization for voice professionals.

- Grow membership for greater impact on the voice profession.
- Build stronger stakeholder relationships (members, donors, vendors, sister organizations, etc.)
- Develop an outstanding portfolio of programs and services for the profession.

GOAL II:

Build organizational capacity to realize Goal I by improving management practices and increasing earned and contributed financial resources.

- Strengthen organizational management processes and practices and add a planning function to all operations areas.
- Strengthen and diversify earned and contributed income.

Our Strategic Plan is a living document with goals, objectives, and action items that will be addressed in ongoing processes that will have fiscal ramifications and require careful financial and action planning. With this Plan we offer an update to our Mission, and add to it our Vision, Values and Diversity and Inclusion Statement.

Executive Summary



Our Vision

Transforming lives through the power of singing

Our Mission

To advance excellence in singing through teaching, performance, scholarship, and research

Our Values

NATS will:

- Support** voice professionals within the studio, classroom, clinic and performance venue.
- Provide** committed leadership to achieve our mission and vision.
- Advance** ethical principles and practices within our profession.
- Celebrate** and recognize the value and efforts of all.
- Encourage** individual skills and creativity.

NATS Diversity and Inclusion Statement

NATS strives to be a welcoming and supportive community of members and students who celebrate the unique identities, varied backgrounds, and experiences of all individuals. We are dedicated to ensuring that all voices are heard in an inclusive environment with equitable treatment for all.

Strategic Plan Goals



GOAL I

Advance the standing of NATS as the preferred professional organization for voice professionals to members, stakeholders and the broader community through increased visibility, dynamic member engagement, and valuable programs and services.

- A) *Grow membership for greater impact on voice professionals.*
- B) *Build stakeholder relationships (members, donors, sponsors, vendors, sister professions).*
- C) *Develop and grow an outstanding portfolio of programs and services for the profession.*

GOAL II

Build organizational capacity to deliver Goal I by improving management practices with volunteer leadership and staff and volunteers and increasing financial resources.

- A) *Strengthen organizational planning, management and use of staff and volunteers by conducting organization management assessment to promote continuous improvement.*
- B) *Increase and align earned and contributed financial resources.*





GOAL I

Advance the standing of NATS as the preferred professional organization to members, stakeholders and the broader community through increased visibility, dynamic member engagement, and valuable programs and services.

The long-term success of NATS is built upon our membership. As a professional service organization, it is critical that NATS listens to and understands the needs of members throughout North America and around the globe. Most recently, NATS listened to our members through a Member Climate Survey. Members benefit greatly from the programs and services NATS offers. Therefore, these areas are grouped together under Goal I of the plan.

Three primary objectives have been identified in support of this goal:

- A. **Membership:** To grow membership by five percent over three years reflecting a rich and diverse community benefiting from and contributing to the NATS experience and the profession.
- B. **Stakeholders:** To optimize the value of stakeholder relationships.
- C. **Programs and Services:** To provide superior programs and services for NATS members by supporting professional development, scholarship and related resources that focus on membership needs.

Objective A—Membership: To grow membership by five percent over three years reflecting a rich and diverse community benefiting from and contributing to the NATS experience and the profession.

Premise

Members are the driving force of NATS and the fundamental reason for its existence. NATS has proven to be a great resource for individual teachers and the profession. NATS membership is largely comprised of independent teachers and those teaching in academic institutions; however, there are large numbers of untapped professionals who could benefit from NATS membership. The larger and more diverse the membership, the more combined resources there are to add value to teacher professional development. Members add reciprocal value to the association through their diverse experience and skills

Strategy

To grow national and international NATS membership by (1) refining and redeveloping a pipeline for acquiring new members among students, young professionals, independent teachers, collaborative pianists, performing artists, and the choral community; (2) welcoming, attracting and retaining a diverse membership through a dynamic member experience, and (3) strengthening the association structure to support a quality experience throughout the organization.



ACTIONS:

1. Increase New Members

Short-term (one to three years)

- Develop new member acquisition plan
- Increase participation in onboarding
- Grow international members
- Create strategies to attract diverse members
- Target messaging to various constituents

Medium-term (three to five years)

- Develop Student Membership and Engagement Plan linked to student programs

2. Increase Retention of Current Members

Short-term (one to three years)

- Develop **#NATSforLife** and suggest that members post photos with this hashtag
- Identify common experiences shared by members
- Engage international members on committees and in NATS programming
- Improve recognition for members at all levels
- Improve reporting and communicating to members
- Explore offerings for independent teachers, collaborative pianists, etc.

Medium-term (three to five years)

- Investigate developing virtual chapters in rural and international areas
- Define affinity and interest areas of member segments
- Repeat Climate Survey

3. Strengthen Association Structure

Short-term (one to three years)

- Review position descriptions for VP Membership, VP Outreach, and staff position of Membership Services Coordinator
- Increase training for elected and volunteer leaders

Medium-term (three to five years)

- NATS leaders continue to travel to regional and state events to deliver specific messages about membership
- Repeat the Member Climate Survey to gather comparative information with the 2019 initial survey



Success Metrics

Short-term (one to three years)

- Increase membership by five percent over three years, inclusive of new, renewed, previous lapsed, and emeritus members. Statistics for 2020 are the result of the 2019 membership campaign.

Baseline	2020	2021	2022	2023
Members	7,070	7,189	7,310	7,433
Includes:				
New	579	599	609	610
Reactivated	366	378	384	390

Outcomes

Short-term (one to three years)

- Pipeline chart of potential members and their sources created as recruiting tool
- Membership increased by a minimum of five percent
- Membership chart of new members, lapsed, renewals over three years created
- Review and revise position descriptions for VP Membership, VP Outreach and Membership Manager

Medium-term (three to five years)

- Membership experience profile of various member subsets created, measuring unique needs
- Climate Survey results from 2019 and 2024 will be compared
- Member satisfaction increased throughout organization

Responsible Players

- VP Membership, VP Outreach, District, Region and Chapter leaders, Executive Director, Membership Services Coordinator, Marketing and Communications Manager

Resource Impact

Short-term (one to three years)

- Income received from moderate increase in membership base
- Increased participation in conferences and workshops, creating higher revenue
- Website revision and updates expense
- Costs of social media and other online marketing through social media

Medium-term (three to five years)

- Fees for second Climate Survey



Objective B—Stakeholders: To optimize the value of stakeholder relationships to benefit NATS.

Premise

NATS can further advance its position in the world of singing by establishing formal relationships and partnerships across a broad spectrum of organizations and industry thought leaders. These relationships can provide increased participation and financial support as well as increased national visibility. Stakeholders may include but are not limited to:

- Donors/funders – Individuals, Foundations, Corporations
- NATS Foundation
- Performing arts organizations and music industry
- Other professional organizations (national and international)
- Publishers/publications
- Advertisers
- Academic Institutions

Strategy

NATS will formalize the stakeholder model to design, track and document strategic relationships that will advance NATS by working on mutually beneficial goals.

ACTIONS:

Short-term (one to three years)

- Identify current and prospective strategic stakeholders.
- Formalize and document criteria/requirements of critical stakeholder relationships
- Develop profiles and strategies for top stakeholders
- Formalize liaisons and relationship managers
- Formalize process of communication, reporting and recognition
- Report relationship progress metrics to members

Medium-term (three to five years)

- Formalize visibility opportunities in regional, national and international markets

Success Metrics

Short-term (one to three years)

- Documented establishment of existing and established stakeholder relationships
- Documented growth of relationships with related schedule of interactions and timelines
- Documented value of the relationship in terms of financial contributions and in-kind services provided to NATS
- Documented internal coverage in NATS publications, website and conferences and workshops
- Documented coverage by stakeholders in their outlets

Medium-term (three to five years)

- Documented coverage in local, state and national media outlets



Outcomes

Short-term (one to three years)

- Top stakeholder categories critical to the future of NATS are identified
- Established formal profiles with agreements of roles and responsibilities of the relationship
- Identification of a relationship manager or official liaison
- The value of relationships formed will be reported in all appropriate means to the membership as they occur

Medium-term (three to five years)

- Local, state, national, and/or international publicity achieved regarding the establishment of major stakeholder relationships formed and the positive outcomes for both the stakeholder and for NATS

Responsible Players

Executive Director, Board President, Secretary-Treasurer, Development Director, Marketing and Communications Manager and others to be identified as relationship managers

Resource Impact

- Attendance at events sponsored by critical stakeholders – fees and travel; information booths etc.
- Additional contributions raised from stakeholders in the shape of booths at NATS events, paid advertising as appropriate, sponsorships, grants, and annual or special occasion contributions



Objective C—Programs and Services: To provide superior programs and services for NATS members by supporting networking, professional development, scholarship and related resources.

Premise

NATS has a 75-year history of providing outstanding programs and services to the profession. Members have been attracted to a wide set of offerings encompassing national conferences and workshops, professional development, research, resources, and student programs. There is general satisfaction within the membership with current offerings; however, there are opportunities to expand programs in crossover genres and deliver programs via new delivery methods. The offerings cover a wide scope and some members are not aware of all that is currently available. Demand for new programs must be carefully brought online and meet specific member/customer and sustainability criteria.

Strategy

To focus on programs and services that provide the greatest value to members by (1) developing a comprehensive and understandable portfolio of programs and services, (2) consistently evaluate offerings with a standardized cost/benefit model and (3) develop and execute a robust marketing plan to increase utilization of programs and services portfolio. (Refer to Appendix for list of Programs and Services.)

ACTIONS:

1. Develop Programs and Services Portfolio

Short-term (one to three years)

- Annual program and services evaluation including risk analysis
- Identify programs, research and services that would have wide appeal to members and the general public to highlight in the media
- Support program leadership transitions with training manuals and timelines

Medium-term (three to five years)

- Conduct industry standard survey and publish results to members
- Develop international program offerings

2. Develop Programs and Services Cost/Benefit Model

Short-term (one to three years)

- Prioritize program importance and target investment to enhance membership experience
- Discern marketability of programs and services that advance the reputation of NATS and address this in the Marketing Plan

3. Develop robust marketing plan of programs and services

Short-term (one to three years)

- Determine the value of the program to members and others outside NATS
- Review all fees and prices and provide competitive analysis and pricing
- Determine optimal methods for where, when and how programs and services may be delivered
- Identify fresh avenues for promoting programs and services to targeted constituencies



Success Metrics

Short-term (one to three years)

- Complete program procedures manuals, using the Intern Program manual as a model
- Revise manuals as needed every two years
- Share pedagogy and strategies internationally

Outcomes

Short-term (one to three years)

- Programs /Services Utilization Chart will show increased participation, attendance, evaluation
- Investment case made for new offering(s) developed with cost/benefit model
- Marketing plan to promote the comprehensive portfolio of offerings with specific market segmented related to members, stakeholders
- International offerings identified and evaluated

Responsible Players

- Program and Services Vice Presidents, Program Coordinators, related staff
- International Advisory Committee and International Coordinator

Resource Impact

Short-term (one to three years)

- Increased funding for selected priority programs
- Increased marketing budget for broader placement
- International travel is adequately budgeted and funded from other interested sources



GOAL II

Increase Organization Capacity through (A.) organizational management assessment for continuous process improvement and by (B.) strengthening and aligning resources to support strategic plan and organizational goals.

Premise

Organizational success for NATS is dependent upon the ability of the organization to lead and manage positive change to keep up with market and organizational demands. It will also require the addition of a vibrant planning process supported by increased revenue (earned and contributed) to realize and sustain these goals. Most notably, it will require NATS to develop a culture of philanthropy by adding a new and ongoing advancement/development program to the organization structure.

Strategy

To improve and align existing and new processes, staff and volunteers, and financial resources to maximize organizational diversity, efficiency and effectiveness by (A) strengthening organizational planning, management, and use of staff and volunteers and by (B) aligning and strengthening the financial platform of earned and contributed revenue.

Objective A—Strengthen organizational planning, management and use of staff and volunteers by conducting regular organizational assessments to promote continuous improvement.

NATS eight organizational function areas include:

1. Governance
2. Organizational Planning
3. Volunteer Leadership
4. Human Resources/ Organizational Culture
5. Develop Marketing and Communications Plan
6. IT and Data Management
7. Facilities
8. Compliance

ACTIONS:

1. Governance—strengthen organizational governance to advance strategic plan

Short-term (one to three years)

- Increased Board Communications and reporting
- Expand efforts in officer and board member training
- Board Meetings – meet semi-annually
- Create Officer and Committee Chair manuals with timelines and procedures
- Bylaws review/revision every two years
- Executive Committee – meet three/four times annually, review strategic plan progress/results at each meeting
- Organizational Diversity-disseminate diversity statement and establish standards to ensure it is put into practice throughout the organization
- Improve the process for minutes production and dissemination of the minutes of the National Board of Directors meetings



Success Metrics

- Frequency of meetings and communication increased
- Minutes are timely and accurate
- Diversity statement disseminated and put into practice
- Board training around diversity, equity, and inclusion provided to orient new board members and officers

Outcomes

- Additional meetings of Board and Executive Committee will increase engagement and knowledge of NATS leaders
- NATS leaders will know their responsibilities and the timelines for actions they need to take within their roles, increasing organizational effectiveness
- Bylaws will remain current and address emerging needs of the organization.

Responsible Players

- President, President Elect, Board Members and Executive Director

Resource Impact

- Deeper engagement and ownership by all Board members





2. Organizational Planning

ACTIONS:

- Track strategic plan objectives, supporting actions and metrics for priorities
- Develop and produce quarterly progress reports to be reviewed by the Executive Committee and Board at their respective meetings
- Each major functional area will submit an annual action plan with objectives, actions and metrics that support the specific initiatives of the strategic plan

Success Metrics

- The Strategic Plan, metrics and outcomes are used as the critical road map to achieve organizational priorities
- The planning function is used in all aspects of the organization so that they align to support the strategic plan
- Alignment of plans will be mutually supportive, helping to create positive synergy

Outcomes

- Planning will become a part of the operational culture of the organization, preparing NATS to achieve growth aspirations
- Operations will be more focused on achieving organizational goals and priorities
- Coordinated planning eliminates duplicative efforts and expenses
- Regular progress reports ensure accountability by staff and volunteers

Responsible Players

- President, Executive Committee, Executive Director

Resource Impact

- Operating costs reduced by eliminating duplicative efforts





3. Volunteer Leadership

ACTIONS

Short-term (one to three years)

- Provide required training in diversity, equity and inclusion for leadership development, including officers, regional, district, and chapter leaders
- Include fundraising fundamentals in leadership training and support materials
- Develop a succession plan for volunteer leaders at all levels
- Provide tools to support volunteer leadership training (manuals)
- Encourage and invite members to become leaders representing diverse academic and independent teaching styles and ethnicities
- Demonstrate appreciation at all levels (automated and non-automated messages of gratitude to volunteers)

Success Metrics

Short-term (one to three years)

- Consistent template developed for procedures in all manuals
- Detail and expand the board manual where necessary
- Leadership development plan completed
- Volunteer leadership training and manuals completed

Outcomes

Short-term (one to three years)

- Understanding of fundraising and fundraising protocols within NATS leads to increased awareness and understanding of philanthropy at all levels of the organization
- Leadership will be strengthened
- Volunteer leaders will know they are appreciated

Medium-term (three to five years)

- Outstanding leaders will emerge to propel the organization to new heights

Responsible Players

- Executive Director, Executive Committee

Resource Impact

- Budget travel expense for officers elect to attend onboard training for their new roles
- Production of training materials and manuals
- Increased access to and use of web-based video conferencing for virtual meetings at the national, regional, and national levels



4. Human Resources

ACTIONS:

- a. Conduct a staff audit to align staff roles and responsibilities with the organization's strategic needs
 - Interview candidates and hire Development Director and Marketing and Communications Manager
 - Evaluate need for realigned and new positions
 - Create a succession plan for staff leadership positions
 - Create an organizational chart

- b. Develop supportive and productive human resource (staff) culture
 - Stress and reward teamwork at every opportunity
 - Conduct performance reviews and discuss annual stretch goals
 - Provide a comprehensive evaluation for Executive Director
 - Provide staff training and development opportunities
 - Recognize achievements and outstanding performance with letters of commendation and periodic all-staff luncheons
 - Develop a can-do culture among staff and provide opportunities for success
 - Reward additional effort by reviewing and increasing staff compensation as budget allows

Success Metrics

- Qualified Development Director and Marketing and Communications Manager hired
- Continuous improvement on realigning staff roles and responsibilities
- Improved staff annual reviews

Outcomes

- Increased teamwork among staff
- Successful integration of new hires into team
- Staff satisfaction increased
- Less staff turnover

Responsible Players

- Executive Committee, Executive Director, Director of Operations

Resource Impact

- Investment in staff sustained due to reduced turnover
- Addition of salary, benefits, expenses for new hires
- Alignment of salaries with increased responsibilities



5. Marketing and Communications

ACTIONS:

a. Advance Institutional Image to members, stakeholders, and the marketplace.

Short-term (one to three years)

- Streamline, revamp website immediately, followed by a redesign as funds are available
- Develop a strategic marketing plan that will advance image of NATS and promote the comprehensive portfolio of offerings
- Increase effective communication internally and externally
- Increase visibility to national and international communities
- Use social media effectively and creatively
- Develop media relations plan
- Create podcast network; develop publicity, exchange agreements to gain free advertising

b. Develop robust marketing plan of products and services

- Grow appropriate advertising revenue from all NATS offerings to critical audiences

c. Support development opportunities

Short-term (one to three years)

- Create Annual Report in collaboration with Development Director
- Support fundraising with graphic design of development materials, placement of stories in NATS website and publications about annual giving, major gifts, planned gifts and various special giving opportunities

Success Metrics

- Marketing plan will be created
- Revenue to increase as a result of additional marketing efforts
- Revised, improved website
- Podcast network developed and launched
- NATS annual report will be created and disseminated in print and on the website



Outcomes

Short-term (one to three years)

- Marketing priorities and revenue opportunities will be clearly identified in the marketing plan
- Members will experience ease of access to NATS information on website
- Podcast network will provide enhanced communication opportunities
- NATS Annual Report will highlight the best of NATS, thank donors, and promote future giving opportunities as well as provide a polished profile of the organization

Responsible Players

- Program and Services Vice Presidents, Program Directors, Executive Director, Marketing and Communications Manager, Development Director
- International Advisory Committee and International Coordinator

Resource Impact

Short-term (one to three years)

- Increased funding for selected priority programs
- Increase marketing budget for broader placement
- International travel is adequately budgeted and funded from other interested sources



6. IT and Data Management

ACTIONS:

Develop outline for dashboard reports in all areas where finance, membership and fundraising data integrates.

Short-term (one to three years)

- Board Reporting – data reported on dashboards
- Membership – renewal, recruitment results tracked on dashboards
- Finance / Budget – thumbnails tracking revenue and expenses
- Fundraising – donor/prospect data to be pulled from membership and uploaded into Donor Perfect
- Create scorecard for comparative monthly fundraising results from 2016 forward
- Marketing and communications – comprehensive tracking of website metrics and social media hits
- Conference and workshop attendance
- Sales data

Medium-term (three to five years)

- Products and Services – produce dashboards for all programs

Success Metrics

- Data will provide performance evaluation information via dashboard reports

Outcomes

- Improved report formatting
- Individual and integrated reports available for analysis
- Ability to run regularly scheduled reports as needed
- Greater analysis available to NATS

Responsible Players

- Executive Director, Marketing and Communications Manager, Development Director, Exware consultant

Resource Impact

- Analytics available to guide decision making
- Cost of data services to create dashboards



7. Facilities

ACTIONS:

Short-term (one to three years)

- Review and Assess office location, square footage, accessibility
- Space utilization: in-house needs versus off-site (virtual) needs and storage
- Capital needs

Medium-term (three to five years)

- Project staffing and space requirements into 2025 to 2030

Success Metrics

- Available space within current office is reorganized.
- Furnishings and technology are updated as feasible within budget
- Alternative office space is explored as needed

Outcomes

- Space is analyzed for optimal use
- Adequate and well-organized space supports greater focus and productivity
- Staff engagement in the process builds teamwork

Responsible Players

- Executive Committee, Executive Director, Director of Operations

Resource Impact

Short-term (one to three years)

- Office and Equipment for Development Director
- Cubicles and modified furniture as needed

Medium-term (three to five years)

- Flooring replaced as needed
- Assess need for greater square footage



8. Compliance

ACTIONS:

- Understand and comply with all legal documentation required of a 501c(3) as directed by state and federal law
- Review financial policies and accounting best practices
- Establish risk management review process
- Evaluate and manage risk related to non-centralized events and programs bearing the NATS identity
- Review legal requirements such as annual audit and receipting of all donations
- Review and advise Board and members about copyright issues related to NATS
- Ensure that all bylaws changes are in accordance with the appropriate state laws and international laws, where applicable

Success Metrics

- Annual 990 Tax Return is submitted on time
- Audit is submitted as required by law
- Potential risk is avoided

Outcomes

- NATS Board and senior staff understand and comply with all state and federal requirements for nonprofit associations
- Copyright issues are clearly understood and communicated to members

Responsible Players

- President, President-Elect, Secretary-Treasurer, Executive Director and legal counsel as appropriate

Resource Impact

- Billable hours by professional advisors needed to accomplish audit and 990 and to review copyright law requirements
- Nonprofit status is maintained, providing tax savings and eligibility for continued philanthropic support



B. Strengthen and align the financial platform of earned and contributed revenue to support organizational goals and strategic plan.

Three critical strategies are:

1. **Financial Management:** To strengthen financial management by continuous improvement of processes and greater resources alignment
2. **Earned Revenue:** To increase earned revenue by developing an entrepreneurial culture to support a growing organization
3. **Contributed Revenue:** To increase contributed income by developing a culture of philanthropy and the establishment of advancement/development function throughout the organization

1. Financial Management: Strengthen financial management by continuous improvement of processes and greater resources alignment

Premise

Good financial management enables an organization to accomplish important big picture and daily objectives. It allows the organization to manage proactively rather than reactively. It helps organizations with understanding of fixed and variable costs and differentiate between direct and indirect costs. It allows the organization to set, track and achieve financial objectives. Ultimately, financial analysis supports better decision making.

Strategy

Clear and complete financial information is needed to enable NATS leaders to make informed decisions that will positively impact the NATS membership experience.

ACTIONS:

a. Financial Analysis & Reporting

Short-term (one to three years)

- Develop reports that are comprehensive and understandable to the layman
- Develop cost/benefit reports for all programs with responsible leaders
- Provide quarterly financial reports for the Board of Directors
- Conduct an annual audit
- Include financial summaries in Annual Report



b. Budgeting

Short-term (one to three years)

- Continue to rely on financial models to ensure best projections possible; examine funding priorities and budget allocations quarterly
- Balance annual operating budget. Match expenses to realistic projections of income. Acknowledge that some reductions may be necessary in the short term until new revenue streams come online. Make choices necessary to keep the organization healthy

Medium-term (three to five years)

- Build operating cash reserves, predicated upon greater budget stability based on all the actions outlined above

c. Planning & Forecasting

Medium-term (three to five years)

- Reach a standard percentage (to be identified) of annual operating expenses covered by endowment income

d. Investments

Short-term (one to three years)

- Establish/strengthen committee(s) dealing with finance
- Evaluate investment company (Ameriprise) relationship
- Seek proposals from Jacksonville financial institutions for investment management

Medium-term (three to five years)

- Determine need/value of diversified investments
- Consider community foundation for investment of true endowment

Success Metrics

Short-term (one to three years)

- Operate without deficits. Be willing to change to ensure this
- Solid and more predictable cash flow

Medium-term (three to five years)

- Established operating reserves equal to 25% of annual operating income



Outcomes

Short-term (one to three years)

- Greater understanding and involvement in budgeting process
- Less variance in forecasting and realized budgets

Medium-term (three to five years)

- Stronger financial position

Responsible Players

- Executive Committee, Committee dealing with finance, Executive Director

Resource Impact

- Balanced budgets
- Financial health



2. Earned Revenue Strategy: To optimize earned revenue by developing an entrepreneurial culture to support a growing organization.

Premise

NATS seeks to grow and better serve their membership. Doing so effectively will require increased revenue. As a non-profit organization, NATS has a history of a break-even financial position. It has also provided many services and programs at little or no cost to members. There is a cost to developing and providing all programs. By moving to a more entrepreneurial mindset, additional revenue can be earned to reinvest in new programs and services for the benefit of members.

Strategy

Comments on the draft Strategic Plan indicated that NATS leaders are hungry for a more entrepreneurial approach to providing programs and services to members. Creating earned revenue has not been a priority for NATS through its history. As a greater focus on earned income began to emerge, it has become clear that an organizational mindset will need to be created in order to open the door to re-examining existing programs for income potential versus seeing everything as a member benefit paid for by dues. Developing new programs that can have a direct revenue benefit for NATS is a new priority.

ACTIONS

Membership Revenue

- *Expand NATS membership by five percent over three years through aggressive outreach to prospective members who are independent teachers, public and private school educators in music and voice, new graduates from university voice programs, students enrolled in pedagogy programs, SNATS members, and former winners of NATS awards*
- *Set fixed periods for membership fee increases. The amount of the fee increase will be determined by analyzing competitors' fees, the value-added areas of NATS membership, and trending in membership fees among the broad spectrum of arts membership associations*
- *Evaluate effectiveness and viability of NATS Marketplace*

Programs and Services Revenue

- Encourage entrepreneurial ventures in concept
- Build a cost/benefit analysis before entering into any new venture, which must be approved by the Executive Committee
- Develop budgets showing income and expense for program offerings as appropriate, including conference and workshop fees and sponsorships, research, resources and student programs



Success Metrics

- Operate without deficits. Be willing to change to ensure this.
- Membership increased by five percent over three years
- Attendance at conferences and events carefully analyzed and increases realized

Outcomes

- Products and services operate within established budgets and cover costs/show surplus
- Increased revenue from membership, products, services and marketplace

Responsible Players

- Executive Director, Executive Committee, VP Membership

Resource Impact

- Additional earned income realized when all income-producing initiatives are identified and maximized



3. Contributed Revenue Strategy: To increase contributed income by broadening the NATS culture of philanthropy and refining the advancement/development function throughout the organization.

Premise

The Member Climate Survey and SOAR Survey conducted in 2019 indicated that much groundwork is still needed to develop a culture of giving among NATS members. Establishing Advancement/Development as a key operational element of NATS, integrated into all aspects of the organization, is essential to its future.

Strategy

A functioning structure for fundraising is necessary in order to support building a culture of philanthropy within NATS. Many first steps were taken in 2019. Included among these was establishing approved Gift Acceptance Policies, which establish key protocols for all staff and volunteers involved in soliciting, accepting, processing and stewarding gifts. Building a base of prospects and donors will lead to stronger giving among members, and that will help to more fully fund existing programs and to develop new ventures. Organized back office operations are also essential for fundraising success, as outlined below.

ACTIONS:

a. Establish leadership and professional roles, protocols and processes

- Develop/modify job descriptions for all parties involved in development
- Hire/onboard new Director of Development
- Establish leadership team approach to increasing engagement in donor cycle, including the NATS Board of Directors, NATS Foundation Board, NATS Advancement Committee and other volunteer solicitors
- Establish realistic goal setting process between the Executive Committee, Executive Director and Development Director, giving consideration to prior years' results
- Provide orientation for board members, advancement committee and volunteer solicitors on fundraising models and methods
- Establish effective reporting and communication among team members
- Provide opportunities for Development Director to speak at various NATS events and conferences and at Board meetings



b. Operationalize donor pipeline and donor cycle

- Develop a schedule and implement the **Annual Fund** to include personal solicitation, mailings, email reminders, stories on the website and in NATS online and print publications
- Continually identify, cultivate and solicit **Major Gift** prospects, preparing and engaging a variety of leadership volunteer solicitors. Develop talking points and background briefings for volunteer solicitors to set the stage for successful contacts
- Promote and increase participation in **Planned Giving** through research, face-to-face contacts and efforts to raise awareness and understanding of the ease with which planned gifts can be made
- Identify members who are retired and record this information in Donor Perfect
- Increase efforts to identify and develop Corporate and Foundation stakeholder relationships, leading to new funding from regional/national sources
- Make **Stewardship** a habit with NATS leaders and staff so that saying "thank you" happens repeatedly for donors, whether it is face to face, or with a special recognition listing in a print publication or on the website. Personal thank you letters and handwritten notes are important
- Engage donors in attending NATS programs and recognition receptions as possible
- Develop an **Annual Report** with Marketing and Communications Manager to update members, donors and stakeholders on the growth and success of NATS and to provide recognition for their contributions

c. Build integrated organizational support and back office systems processes

- Work with various NATS staff to ensure that valuable historic member data is imported into Donor Perfect, including giving, service, and engagement with NATS
- Collect and import dates of birth for input in Donor Perfect
- Work with various NATS staff to develop appropriate giving reports that are easily understood by others
- Train/mentor staff in fundraising best practices

d. Development and Marketing/Communications Plan

- Development Director to collaborate with Marketing Manager to strategically place information on website, in Constant Contact messages, and in NATS online and print publications and to develop an annual report to members and selected stakeholders



Success Metrics

Short-term (one to three years)

- Donor Perfect reports created and used to target potential major and planned gift donors and to track donor metrics
- Establish the donor retention rate among NATS donors over the last three to five years; then establish goals for increasing this rate from year to year by percentages
- Major gifts from individuals and foundations will be solicited by NATS, Inc. to fund programs and services, based upon needs identified by the Board. This amount will increase by a percentage to be identified each year
- A minimum of eight to twelve newly documented planned gift intentions (pledges) will be secured annually, increasing by five pledges per year (These pledges are in addition to realized bequests.)

Long-term (five to ten years)

- Launch five-year endowment campaign, designed to provide a secure financial underpinning for the future, based upon organizational readiness, a growing donor base, and a feasibility study.

Outcomes

- Fundraising integrated into all aspects of the organization
- Donor Perfect fully utilized to support Development Director in fundraising and to produce useful reports to track progress
- Minimum number of donors will increase from 3% of the members to 10% over three years
- A minimum of 12 newly documented planned gift intentions (pledges) will be made annually, in addition to planned gifts realized each year

Responsible Players

- Executive Committee, Advancement Committee, Executive Director, Development Director, Marketing and Communications Manager, Accountant, Membership Services Coordinator



Resource Impact

Short-term (one to three years)

- Steady growth in annual gifts realized, along with greater understanding of the need for philanthropy to sustain the growth and impact of NATS
- Portfolio of major and planned gift prospects and donors developed
- Staff and volunteers more readily support fundraising efforts
- Printing, travel and entertainment budget, salary and benefits of Development Director; increased engagement by Executive Director will also generate greater travel and entertainment expense

Medium-term (three to five years)

- Addition of Development support staff member
- Consultant fees to develop feasibility study for endowment campaign
- Print and media materials for endowment campaign

Long-term (five to ten years)

- Five-year endowment campaign implemented while maintaining all other modes of fundraising, with the result of sustaining annual philanthropic support and providing long-term financial stability



Teaching Performance Scholarship Research



Appendix I



Programs and Services Categories

PROGRAMS

Conferences (professional development)

- Regional
- National (Biennial)
- International (ICVT); members attend EVTA and others

Member Professional Development Programs

- Workshops/Master Classes/Clinics
 - National Workshops (participation stats available since 2015):
 - Winter (1 annually)
 - Summer (1 in off-Conference years)
- Mentoring Programs
 - NATS Intern Program (15-16 fellowships/awards)
 - NATS Mentored Teaching Experience (at Workshops, since 2014?)
 - NATS National Mentoring Initiative (NNMI)- launched Fall 2019
 - Mentoring Over Coffee (at Biennial National Conference 2018)
- Awards and Competitions
 - Conference Years (biennial)
 - Lifetime Achievement (2)
 - Emerging Leaders (7)
 - Boytim Independent Teacher (14)
 - Voice Pedagogy (1)
 - Competitions
 - NATS Artist Awards
 - National Music Theater Competition Awards
 - Annual
 - National Student Auditions
 - Art Song Composition
 - Van Lawrence Fellowship (1-2) – partner with Voice Foundation
 - Intern Program (15 fellowships/awards)
 - Regional Member Awards

Student Development Programs

- Annual Auditions
 - National Student Auditions (competition, awards)
 - Region
 - State
 - Chapter
- Special Awards – Known examples: Texoma, Great Lakes, Ohio
- Student NATS chapters (SNATS) and SNATS Chats
- Clinics, Workshops, Posters
 - National (NSA workshops)
 - Regional (Known examples: Central, Southeastern)

Appendix I



Services

- Awards – see related monetary awards under Programs
- NATS Discretionary Fund
- Member Recognition

National

- 'NATS for a Lifetime' Profiles
- Conference Presenters: certificates
- Leadership Luncheon (at biennial conference)
- *Inter Nos*: list of donors; independent studio focus
- 2018 Conference Program: listing of donors, past presidents
- Lifetime Achievement Award (member awardees in 2016 and 2018)
2015 Board approved 2 awards per conference
- Website: donors, history of past awardees for various programs, current board, past presidents, NATS History
- *Intermezzo*: some focus on individual members
- NATS Facebook Page: photos, some member news, travel to events

Region and District – known examples

- Central Region: Lifetime Achievement Award (annually)
- Kentucky District: Award for Best Student Audition, *in memoriam* of former member, Gina Scaggs Epifano
- Southern Region: Collaborative Pianist Award

PRODUCTS

Research and Resources

- Publications
 - *Journal of Singing*
 - *Inter Nos*
- Intermezzo (weekly news feed)
- Vocapedia
- Website(s)
 - National (staff-managed)
 - Region (all 14 have websites)
 - Chapter (majority of chapters have websites)
- NATS Chats
- Wellness Blog
- Presentations/posters
 - National Conference (peer-reviewed)
 - Regions (Cal-Western, Central, Eastern, Mid-Atlantic, Northwestern, Southeastern, Southern, Texoma, West Central)
- NATS Live Learning Center
- *So You Want to Sing: Guides for Performers* – book series in 20 volumes; in cooperation with Rowman and Littlefield publishers

Appendix I



- National Committees
 - Advocacy (2018)
 - Ethics (standing)
 - International Advisory (2018)
 - International travel program/trip (2019); Ambassadors
 - Mentoring Initiatives (2019)
 - Conference, Audition, and award selection committees
 - Voice Science Advisory
- National Committees
 - Membership (recruitment/retention guide)
 - Advancement
 - Ethics
- NATS Job Center

Appendix II



Rosters

NATS Board of Directors

National Officers

Karen Brunssen	President
Carole Blankenship	President-elect
Linda Snyder	Past President
Diana Allan	Vice President for Auditions
Alison Feldt	Vice President for Outreach
Nancy Bos	Vice President for Membership
Kristine Hurst-Wajszczuk	Vice President for Workshops
Jason Lester	Secretary/Treasurer

Region Governors

Ruth Ellis	Cal-Western
Thomas Hueber	Central
Mario Martinez	Eastern
David Mannell	Great Lakes
Julie Anne Wieck	Intermountain
Jill Terhaar Lewis	Mid-Atlantic
Mark Kano	Mid-South
Julie Krugman	New England
Kathleen Otterson	North Central
Marieke Schuurs	Northwestern
Marcia Porter	Southeastern
Shawn Roy	Southern
Randall Umstead	Texoma
Alisa Belflower	West-Central

NATS Foundation Board of Directors

Brian Horne, President
Sarah Holman, Administrative Vice President
Dian Lawler-Johnson, Secretary
Donald Simonson, Treasurer
Chadley Ballantyne
Torin Chiles
Leslie Holmes
Kimberly James
Aaron Johnson
Barbara Hill Moore
Gale Odom
Kari Ragan
Martha Randall

Appendix II



Rosters

Advancement Committee

Kari Ragan, Chair
Karen Brunssen, NATS President
Carole Blankenship, NATS President-Elect
Michelle Markwart Deveaux, NATS California Capital Chapter Past President
Allen Henderson, NATS Executive Director
Aaron Johnson
Jason Lester, NATS Treasurer
Lorna MacDonald
Scott Piper
Frank Ragsdale
Linda J. Snyder, NATS Immediate Past-President
Valerie Trujillo

Strategic Plan Task Force

Karen Brunssen, Chair
Carole Blankenship
Linda Snyder
Diana Allan
Jason Lester
Allen Henderson
Sarah Holman
Sonja Baker
Jerry Elsbernd
Michelle Markwart Deveaux
Cynthia Vaughn
Ayumi Nakamae
Frank Ragsdale
Julie Krugman
Randy Umstead
Lloyd Mims

Consultants

Strategic Funding Solutions: Laura Fike and Shelley Outlaw

Appendix III



Glossary of Terms

Assessment Model – instrument for evaluating organizational effectiveness

Capacity Building – organization’s ability to navigate challenges, growth and other opportunities to thrive

Continuous Improvement – ongoing effort to make improvements through an inclusive formal process measuring quality, time, reduction of waste and added value

Decision Process – consideration of opportunity cost, customer experience, organizational value proposition, risk and sustainability

Donor Perfect – relational database used in fundraising to manage and track contacts made with prospects and donors, including cultivation, gifts asked and received, stewardship, and next moves

Membership Experience – how every individual who joins NATS interacts with the organization at every contact point

Onboarding – the process of integrating a new member, volunteer or employee into the organization, to familiarize them with its products, programs and services, and to begin meaningful engagement

Stakeholder – any group or individual who can affect or is affected by the achievement of the organization’s objectives

Stewardship – ensuring member, donor and other constituent satisfaction with the organization via communication, appreciation, recognition