

# **International Percy Grainger Society**

## **2021–2025 Strategic Plan**

Authors: Paul Jackson, Susan Edwards Colson, Alison Paul  
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## Purpose

The International Percy Grainger Society (IPGS) and Percy Grainger America (PGA) convened a Strategic Planning Task Force (SPTF) in May 2020 to develop a strategic plan for the period 2021–2025 which would chart a course to sustain the organization over that period and would also ensure a vibrant and lasting legacy for the life and work of Percy Grainger, including his house at 7 Cromwell Place. The activities of the UK-based Percy Grainger Society (UKPGS), founded by IPGS President Barry Ould, were also considered in the development of the strategic plan.

## Process

IPGS Board President Barry Peter Ould reached out to a distinguished team whose collective professional experience brought considerable expertise to the planning process. The members of the SPTF also facilitated connections with key organizations in the United Kingdom, Australia and the United States, such as the Grainger Museum and the Library of Congress. The process included consultation with the IPGS Board through its regular meetings, and the gathering of perspectives from board members through a self-assessment tool.

Under the guidance of Chair Paul Jackson, the twelve members of the SPTF, along with ex-officio members Barry Peter Ould (IPGS Board President), Anne Ocone (Grainger House Museum Coordinator) and Alison Paul (external consultant), met in June, August, October and December as a whole group to construct the plan.

### Strategic Planning Task Force Sub-Groups

The SPTF convened four Sub-Groups, each led by a member of the IPGS board, to consider the following areas: Governance; Membership; Journal; and House and Collections. Beginning in June 2020, and meeting bi-monthly, each Sub-Group produced strategic and operational recommendations that were considered by the SPTF as a whole. Recommendations were also informed by extensive collaboration with representatives from a number of external organizations and from similar interest groups. The sub-groups comprised:

#### Governance Sub-Group

Chair: Susan Colson – *Secretary and Treasurer, IPGS*  
Paul Cohen, DMA – *Concert saxophonist; Proprietor, To the Fore Publishers*  
Marissa Kyser – *Director of Band and Choir, Spokane MO R-VII School District*  
Barry Peter Ould (ex officio) – *President, IPGS*

#### Membership Sub-Group

Chair: Major (ret.) Bill Garlette – *Conductor and Music Director, Chesapeake Bay Wind Ensemble*  
Robert Simon – *Founder and Conductor of the Piedmont Wind Symphony*  
R. Mark Rogers, DMA – *Managing Editor, Keiser Southern Music Company*  
Alison Paul (ex officio) – *Consultant*

#### Journal Sub-Group

Chair: Paul Jackson – *Vice-President Strategic Planning, IPGS*  
Chalon L. Ragsdale – *Professor of Percussion, University of Arkansas; President, Aux Arcs Music Publishing, LLC*  
Stephen G. Carpenter – *Principal Conductor, Heidelberg Wind Ensemble*

#### House and Collections Sub-Group

Chair: Matthew McGarrell – *Director of Bands (ret.), Brown University*  
John Roscigno – *Chair of the Department of Music, California State University, Northridge*  
Roland Yeung – *Music Director & Principal Conductor, The Grainger Wind Symphony*  
Anne Ocone (ex officio) – *Grainger House Museum Coordinator*

NB: Summaries of the recommendations from each Sub-Group are contained in Appendices 1–4 for information. Note that these may differ in wording from the Strategic Plan Objectives and Milestones.

## **IPGS Board Approval**

The recommendations from the SPTF, together with the returns from the IPGS Board Self-Assessment, conducted in September 2020, were formulated into the Strategic Plan Objectives and Milestones by SPTF Chair Paul Jackson, SPTF Governance Lead Susan Colson, and external consultant Alison Paul. The draft Objectives and Milestones were presented to the IPGS Board in November 2020 for conditional approval, to the SPTF in December 2020 for further comment, and again to the IPGS Board in January 2021 for final approval and sign-off.

Significant factors informing the preparation of the Objectives and Milestones are:

- a) the decline of income from royalties from the performance of Grainger's works
- b) increased operational needs
- c) a desire for the long-term stability of Grainger's legacy, including the house and collections

## **Vision and Mission**

As part of the planning process, the Vision and Mission of the existing IPGS were reviewed and the following changes are proposed to more closely reflect the strategic direction for the next five years.

### **Vision**

We envision an international community that values the exploration of the music, heritage, and culture of the early 20th century, particularly as it relates to Percy Grainger's work, and is empowered to preserve it and interpret it for future generations.

### **Mission**

Our mission is to promote the work and legacy of Percy Grainger with a membership community that preserves his historic house, encourages appreciation and performance of his music, and promotes a deeper understanding of the cultural, social, and economic context of his life and work.

## **Summary Objectives**

The following high-level Objectives, grouped under the three headings that were used in the 2016 Strategic Plan, are proposed to prepare the organization for success in the period 2021–2025.

### **Organization Consolidation**

- Combine the IPGS, PGA and the Percy Grainger Society (UK) into one consolidated organization, with necessary supporting documents

### **People and Community**

- Create a new membership program that reaches out to a wide range of constituencies
- Produce a bi-annual journal to act as a means of promoting and disseminating research and information about Grainger
- Plan for staffing, supplemented by volunteers, to support ongoing communications and outreach

### **Physical Property and Interpretation**

- Create an annual and capital plan to maintain the house and property at 7 Cromwell Place
- Revisit the current Collection Protection and Preservation Policy, together with security, (de)accession, storage and classification procedures
- Provide programs that attract virtual and physical audiences to learn about and delight in all things Grainger

Where appropriate, the implementation of Objectives should be articulated with the aims and activities of the Grainger Museum, and should fully embrace the advantages of technological opportunities in order to reach a wider audience, to increase levels of accessibility of the collections, and to make available the collective expertise of the society's members.

## Strategic Plan Objectives and Milestones

## Organization Consolidation

**Objective:** Combine the IPGS, PGA and the Percy Grainger Society (UK) into one consolidated organization, with necessary supporting documents.

We will:	Who	What	Resources	When
1. Establish an interim Governance Committee to effect the transition from the IPGS to the new organization	SPTF leads			January 2021
2. Determine a name for the new combined organization	GC			January 2021
3. Approve Vision and Mission Statements	GC			January 2021
4. Draft new bylaws and ensure all legal processes, policies, and documents are in place to support new structure	GC		SEC and ProBono Partnership	Spring 2022
5. Confirm roles and personnel for the new Executive Board, and for the new Committees and Advisory Groups	GC and EC	Define roles, find volunteers	Membership elections (Board)	ASAP 2021
6. Create an Emeritus Board or similar group to maintain connections with outgoing IPGS board members	EC and BPO	Music discussion	4 per year via Zoom	January 2021
7. Rebrand the new organization	EC	Roll out as part of anniversary year		May 2021
8. Close down other Percy Grainger America and the UK Percy Grainer Society	SEC (PGA) BPO (UKPGS)	Delete/amend references. Redirect URLs	Filing fees (\$500)	May 2021
9. Redesign the website to reflect the new society and ensure the website is a robust source of information and resources	EC EC and MC	Define content	Web designer (\$5,000)	May 2021
10. Design and implement an Operational Plan for the new society, including staffing, programs, fundraising, financial procedures, and accountability	EC	Construct an aspirational budget including fundraising, consider a capital campaign		Spring 2021
11. Design and implement a comprehensive Fundraising Strategy aligned with the new society's objectives	EC			ASAP 2021

GC = Governance Committee (SPTF leads)

EC = Executive Committee (President, Secretary, Treasurer)

Board = [new organization] Board

SEC = Susan Edwards Colson

BPO = Barry Peter Ould

MC = Membership Committee (Secretary)

JB = Journal Board (Editor, Associate Editor(s), Production Assistant)

PC = Programs Committee

CC= Collections Committee (Chair)

DC = Development Committee

## People and Community

- Objectives:** Create a new membership program that reaches out to a wide range of constituencies  
 Produce a bi-annual journal to act as a means of promoting and disseminating research and information about Grainger  
 Plan for staffing, supplemented by volunteers, to support ongoing communications and outreach

We will:	Who	What	Resources	When
1. Develop a Communication Strategy and Operating Procedures	EC and MC		Website fees (\$90), mailing lists	ASAP 2021
2. Develop a strategic and operational Staffing Plan, including the recruitment, induction, development and support of (international) volunteers and docents.	EC and Board	Staffing Plan	AASLH <u>STEPS</u> program	Summer 2021
3. Develop a Membership Model and Management Plan to include costed strategies for the recruitment, induction, support and retention of members	EC and MC		Recruitment consultant (\$2550)	ASAP 2021
4. Confirm membership benefits that add Value and Worth to our offerings	EC and MC	Brochure, web site, social media		Spring 2021
5. Promote membership of the society to a wide variety of people, including performers, conductors, educators, researchers and scholars from all levels and countries	MC	Board, committees and advisors to join	Website to join and renew memberships	ASAP 2021
6. Collaborate with existing organizations, such as the College Band Director Association and the International Conductors Guild, to promote engagement and membership	Board	Offer membership incentives and cooperative ventures		
7. Establish an editorial board, define policies, procedures and content for the new Grainger Society Journal	EC and JB			Spring 2021
8. Produce and distribute biannual editions of the journal, both in print and electronic formats	JB			June/July 2021
9. Form a Program Committee tasked with planning an ongoing program of interest to members, with consideration of annual themes, including the 2021 anniversary celebrations	EC, MC and PC	Coordinate with membership	Appropriate audio-visual and social media platforms	Four programs per year
10. Develop interpretive house tours with a focus on virtual tours	PC	Define six collections	AV equipment, software, staff	ASAP

## Physical Property and Interpretation

**Objectives:** Create an annual and capital plan to maintain the house and property at 7 Cromwell Place

Revisit the current Collection Protection and Preservation Policy, together with security, (de)accession, storage and classification procedures

Provide programs that attract virtual and physical audiences to learn about and delight in all things Grainger

We will:	Who	What	Resources	When
1. Define the long-term purpose and use of the house, ensuring programming, management and income generation support this purpose	EC	Explore programs or alternative uses 2021-22	<a href="http://grantstation.com">grantstation.com</a> and/or consultant	By 2025
2. Update the <u>Percy Grainger House Master Plan</u> to address the physical, structural, environmental, safety, and security needs of the house.	EC, CC, DC	See Appendix 4	Capital expenditure and fundraising	2022–2025
3. Develop or revise existing policies pertaining to collections development, inventory and cataloging, preservation and storage, and access to the collection for researchers, website users, and visitors to the house	Volunteers, docents, staff. Establish follow up with visitors	Review and update the 2016 <u>Collection Protection and Preservation Policy</u>		May 2021
4. Position the collection in the context of other significant repositories of Grainger materials worldwide, including the Grainger Museum and the Library of Congress	Board, Members	Populate the <u>PastPerfect</u> site		2021–2022
5. Plan and advance the collections catalogue and inventory. Address preservation and storage needs of the house contents	CC, Board, staff, volunteers		Cataloguing staff and volunteers	Ongoing
6. Make the collections available to a wider audience, both in person and virtually	CC	Promote physical and virtual collections	Exhibition space, website and social media platforms	Ongoing

## Appendices

## Appendix 1: Governance Sub-Group Summary Recommendations

**Bylaws** will include: Name, Purpose, Mission, Vision, Governing Board (terms, duties, vacancies), Officers, (President, VPs, Secretary, Treasurer (roles, terms, duties), Committees (roles, duties). The duties addressed in the bylaws will include:

- Executive Committee (Duties: Administration, Personnel, Finance, Nominating, House & Collection)
- Membership (Programs, Marketing, Member Engagement, Advisory Committees)
- Development (Fundraising, Communications)

**Affinity Groups** focusing on specialty interests of volunteers can be established. Suggestions include:

- **Grainger Residence Advisory Group:** The Grainger Residence Advisory Group has two fundamental purposes: to support the organization in carrying out its mission, and to review, offer advice, and guidance about, and lend support to collection, conservation, exhibition, education and public programs, and to assist with developing public programs
- **Grainger Music Advisory Group:** The Grainger Music Advisory Group's purpose is to discuss the music and serve as a network of Grainger fans

### Communications

It is hoped that a clear mission, structure, and program focus will provide the appropriate framework for excellent communication. Communications for the Society includes strategies for getting in touch and staying in touch with members (potential, as well as actual), visitors, volunteers and the public at large. The goal is to deliver our message to potential 'customers', moving them to action (membership, visits, program/event attendance). Vehicles for communicating include:

- The **Website** is the communication home for the society. Its goal is to deliver content, answer questions, and provide resources
- The **Grainger Journal** is a biannual periodical devoted to Grainger that includes substantial essays, reviews of new books, scores, and recordings. From 1978-2002, the journal was published as a collection of Grainger essays
- The **Grainger Blog** is part of the website and focused on (generally one-topic) informational discussion of interest to the Grainger Community. Guest bloggers are welcome, submission guidelines are here
- A **Discussion Forum** on the website should be considered
- The **Grainger Notes** is a regular eblast to members and friends devoted to timely items of immediate interest to the Grainger community
- Grainger **Webinars** should be offered to membership at least quarterly. A speaker's bureau/scholars list might be considered for other organizations.
- **Virtual Tours** promoted and enables via social media channels

Documents for internal use should be considered, suggestions include an Interpretation Manual for 7 Cromwell Place, as well as a Collections Policy.

## **Appendix 2: Membership Sub-Group Summary Recommendations**

- Develop a comprehensive Membership Model and Management Plan to include recruitment and retention to increase membership numbers and diversity of membership
- Continue developing Value and Worth items to attract new members, engage current and future members, and provide the research and education outreach aspects of the society
- Finalize society brochure
- Develop an online and paper-based membership application form
- Develop clarity of our online presence. Create easy access to joining and using all Grainger websites (home page, blog, YouTube, etc)
- Identify staffing needs and if a position can be funded

### **Membership Type/Levels:**

1. Premium/Professionals – \$60 (this could include an introductory offer, multi-year discounts, discounts for membership of other interest groups)
2. Educator – \$40
3. Students – free

### **What membership offers**

1. Print and electronic copies of the biannual journal
2. Access to past journals
3. Discounts in Lyrebird Press online shop
4. Discounts on select, original works of Grainger
5. A regular newsletter
6. A members-only section on our website
7. A dedicated YouTube channel
8. A schedule of webinar interviews
9. A schedule of online video seminars on various Grainger topics and compositions
10. Presentations on the website and/or on YouTube
11. Research resources

### **Further benefits could include:**

12. Mentorship on Grainger projects
  - a. Theses, articles and occasional writing support and advice
  - b. Performance practice advice and compositional analysis
13. Ideas for the members section of our website:
  - a. Links to recommended theses/analysis of Grainger's compositions
  - b. Read-only pdfs of out of print or difficult to find items

### Appendix 3: Journal Sub-Group Summary Recommendations

1. Establish an editorial board, including a succession plan, to include a Series Editor, Associate Editors, and Production Team. The Editorial Board will further:
  - a. Develop an editorial policy, including submissions guidelines
  - b. Approve an outline content scheme (see appendix for details)
2. Confirm the design and publication platform (proposal: Blurb)
3. Confirm a printing and distribution platform (proposal: Lulu)
4. Confirm a pricing and costing model, in accordance with proposed membership fees, to ensure annual journal production is less than 50% of average membership income
5. Produce a twice-yearly journal in both paper and digital (pdf) formats, available only to members
6. Make freely available digital versions of the journal to the general public after a period of two years, via the journal archive section of the society website

#### Indicative Outline Content

##### Editorial

##### News

- a. Information and updates from the IPGS (possibly including meeting summaries)
- b. Updates about work on Cromwell Place (or this could appear in section 4d below)
- c. News about PG activities (“Grainger around the World”) including forthcoming events

##### Original articles

Two or three substantial research article(s) per issue under the following thematic headings:

- a. Grainger research – original new research articles exploring an aspect of Grainger’s life and work
- b. Grainger’s influence – a regular feature from prominent musicians about their relationship with Grainger and his music
- c. Performing Grainger – exploring a current aspect of performance practice in an identified PG work

##### ‘From the Collections’

- a. From the composer 1: reprints of articles by or about PG that have not previously been published and/or are difficult to find
- b. From the composer 2: reprints of a letter or communication from or to PG
- c. From the house: articles exploring objects located in White Plains. This could cover a range of topics (artwork, fashion, furniture, music). This could include guest contributions from experts in discipline areas other than music
- d. From the archives: whole or partial manuscripts (scores) and extracts, and/or features from the Grainger Archive, Grainger Museum, Library of Congress (and other major depositories)

##### Reviews

- a. Recent concerts
- b. Recent and/or existing recordings
- c. New books and articles
- d. New or existing compositions or arrangements inspired by Grainger

##### Letters to the Editor

## Appendix 4: House and Collections Sub-Group Summary Recommendations

We will assess the purpose and long-term management options for the house and collection. We will pursue funding for the house and collection in order to realize the following:

### House at 7 Cromwell Place, White Plains, New York

We will:

- Define the long-term purpose and use of the house, ensuring programming, management and income generation support this purpose
- Within this context, continue to address structural, environmental and safety issues
- Consider a capital campaign to support the house

After the current construction projects are complete in the parlor/dining room, the first floor will be usable for exhibitions, concerts, meetings, etc, although the building still will not be ADA compliant and the bathroom is in the cellar (these two restrictions reduce the usefulness of the space and limit the options for rental to outside groups). Pending a capital funds campaign or grant support, we will:

- Repair the ‘Yankee’ gutters and roof: Cost: Target completion:
- Repoint the chimney Cost: Target completion:
- Paint the house exterior Cost: Target completion:
- Restore of all the windows in the house Cost: \$140,000 Target completion: Fall, 2022
- Restore the five second floor rooms still to be completed, one room at a time, beginning with the bathroom, followed by Ella’s studio, Ella’s bedroom, Percy’s studio (Rose’s bedroom), and Percy’s bedroom. Cost: \$50,000 Target completion: Spring 2024

### Collections

We will:

- Position the collection in the context of other significant repositories of Grainger materials worldwide
- Make the collections available to a wider audience, both in person and virtually
- Develop or revise existing policies pertaining to collections development, inventory and cataloging, preservation and storage, and access to the collection for researchers, website users, and visitors to the house Target completion: May 2021
- Create an inventory and catalogue and address the preservation and storage of the contents of 7 Cromwell Place by 2025 and commit the system to writing so that independent contractors and volunteers have clear instructions
- Engage an independent contractor dedicated to cataloging Cost: \$10,000 Target completion: May 2021
- Recruit three volunteers to assist with cataloguing Target completion: May 2021

Cataloguing priorities:

1. Music collection
2. Bound media
3. Audio media
4. Video and motion-picture media
5. Photographs and negatives
6. 2D and 3D objects
7. Furnishings
8. Clothing
9. IPGS records