

# STRATEGIC PLAN 2021-2023

APPROVED BY THE BOARD OF DIRECTORS  
MAY 17, 2021



# PJCE

*Marilyn Keller with Portland Jazz Composers Ensemble.  
Photo by Kimmie Fadem.*



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*Portland Jazz Composers Ensemble at Montavilla Jazz Festival. Photo by Aaron Hayman.*

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## EXECUTIVE SUMMARY

*L to R: Darrell Grant, Marilyn Keller, Damian Erskine, Machado Mijiga. Photo by Douglas Detrick.*

### Evolving to meet the demands of the future.

Portland Jazz Composers Ensemble (PJCE) creates and performs original jazz music that engages and supports our community's diverse artists, cultures, and place. In our strategic plan we are preparing to do this work for more people, in more diverse and creative ways, and with a stronger financial foundation.

We completed this planning process during the COVID-19 pandemic and related economic recession, and an urgent movement for racial justice. Our plan is both compelled and motivated by those conditions and by the changing cultural and economic demands on Portland artists.

Building on our previous achievements, we believe that a growing PJCE will better support its dynamic community of artists, audiences, and students of jazz in Portland.





Andrew Oliver. Photo by Douglas Detrick.

# MISSION & VISION STATEMENTS

*Revised as part of our Strategic Planning process.*

## Mission

PJCE creates and performs original jazz music that engages and supports our community's diverse artists, cultures and place.

## Vision

PJCE envisions a vibrant jazz community where composers, performers, students and audiences create, see and hear their cultural experiences artistically expressed and represented in original jazz compositions and performance.



*Rebecca Sanborn. Photo by Douglas Detrick.*

# VALUES STATEMENT

**Community:** We value a supportive community experience that includes a diverse group of composers, performers, audience, and students.

**Integrity:** We carry out our work with the greatest responsibility, openness, and accountability.

**Innovation:** We honor jazz and its legacy as an inclusive and diverse art that constantly renews itself in each generation's time and place.

**Legacy:** We recognize jazz as a quintessentially American cultural achievement and contribution to world culture, created from and within the African American experience in the United States.

**Respect:** We treat all people, communities, and cultures with dignity and respect.

**Excellence:** We strive for excellence in all our endeavors.

**Creativity:** We value imagination, innovation, and music that embraces local culture, community and history.





*Virginia Lopez. Photo by Douglas Detrick.*

## STRATEGIC DIRECTION

**In this strategic plan, over the next two years PJCE will pursue a strategy that supports:**

- Equitable, broad, inclusive community participation by as diverse a population as possible among artists, audiences, and PJCE leadership.
- Flexible, adaptive programming that supports and engages our community during and after pandemic conditions.
- Increased financial growth and sustainability to ensure a robust future for original jazz in Portland.
- Efficient, effective, impactful organizational Infrastructure to maintain the highest possible professional expectations.



# STRATEGIC GOALS & ACTIONS

Shao Way Wu. Photo by Douglas Detrick.

## **Strategic Direction #1: Equitable, broad, inclusive community participation.**

*Goal #1: Ensure BIPOC, people under 35, and women and nonbinary people are participating as composers, performers, staff and board members, and audience members as a growing and indispensable part of our community.*

- Provide opportunities for all PJCE Board and staff to learn how to be leaders in achieving greater equity in Portland's jazz community.
- Survey artists who participated in PJCE programming in FY20 and FY21 to improve our understanding of the demographic characteristics and the concerns of our artist community.

- Conduct annual surveys in FY22 and 23 to measure participation of BIPOC, people under age 35, and women and nonbinary people in an annual survey of entire audience/donor community.
- Conduct surveys of all performers and composers after each project in FY22 and 23 to measure participation of BIPOC, people under age 35, and women and nonbinary people.
- Recruit new Black, Indigenous, or People of Color (BIPOC) Board members.
- Work with an experienced consultant to help PJCE create a formal DEI plan making use of data gathered and the experience gained from the Actions described above.

*Goal #2: Honor African-American community's central role in jazz history by investing in deeper connections to Portland's Black community.*

- Develop at least one programming partnership with a Black-led organization or business.

## **Strategic Direction #2: Flexible, adaptive programming that supports and engages our community during and after quarantine conditions.**

*Goal #1: Ensure programming decisions are made according to publicly accessible guidelines for greater transparency.*

- Update and publish guidelines that define our approach to programming, and how composers and musicians can get involved.
- Solicit input from our artist community about past programming and recommendations for future programming on an annual basis about how to meet our goals in terms of artistic merit and DEI goals.



*Goal #2: Place large ensemble programming on hiatus until pandemic conditions subside, using the hiatus to reevaluate ensemble's organization and community participation.*

- Solicit feedback to reevaluate large ensemble membership and projects with a focus on equity and opportunity.

*Goal #3: Begin to offer commissions and performance opportunities to composers working with their own small groups.*

- Increase number of composers engaged compared to FY20.
- Develop some small group commissions into large ensemble projects.
- Build strategic partnerships with venues to increase number of new music presentations.

*Goal #4: PJCE Records takes on a more prominent and innovative role in documenting PJCE projects and releasing work to the public.*

- Increase number of annual audio and video releases on PJCE Records through technology, fundraising partnerships and live recordings.
- Research and solicit feedback on ways to best support the current needs of PJCE Records artists.



L to R back row: Mieke Bruggeman, Chelsea Luker, Mary-Sue Tobin, Michelle Medler. Center: Andrew Durkin. Photo by Chad Lanning.

*Goal #5: Explore methods to reach more young people through the Young Composers program while continuing mentorships similar to previous years.*

- Produce video content and/or live presentations suitable to in-school audiences focused on jazz composition as an applied creative medium.
- Coordinate with other jazz organizations that are producing K12 music education programming.

## **Strategic Direction #3: Increased financial growth and sustainability to ensure a robust future for original jazz in Portland.**

*Goal #1: Acquire stable, broad-based, financial and non financial resources to support the programs and growth envisioned in this strategic plan.*

- Assess relative potential for growing various types of giving. Draft revenue and expense models for financial scenarios, including exploratory planning for financing staffing and leadership transition.
- Maintain current foundation and government grant relationships and approach new foundations for funding.
- Designate amount and purpose for a reserve fund, budget any remaining surplus to achieve goals.

*Goal #2: Cultivate and increase individual donors to play a larger role in funding PJCE programs especially during and after pandemic.*

- Increase Super Sustainer and Sustainer contributions as share of total contributed revenue.
- Provide all donors with consistent and meaningful opportunities to experience music by PJCE artists.
- Review and assess membership engagement, recognition, and contributing potentials.

*Goal #3: Develop decision making processes informed by routine, effective financial analysis.*

- Define metrics and means for financial analysis, coordinate all actions with budget process to ensure adequate resources are available.

*Goal #4: Restore earned revenue to at least of half of pre-pandemic level as share of total revenue, 20%.*

- As conditions allow, restart ticketed events using hybrid model with live and online audiences simultaneously.
- Evaluate livestreaming as a permanent addition to PJCE productions.
- Explore new earned revenue strategies including audience development, more frequent PJCE Records releases, merchandise, licensing, and others.



Portland premiere of "From Maxville to Vanport" at Alberta Rose Theater. Photo by Kimmie Fadem.



## Strategic Direction #4: Efficient, effective, impactful organizational Infrastructure

*Goal #1: Ensure staff, board, and artists have access to tools and documents that help us pursue our mission.*

- Evaluate current technology tools, and invest in new tools that will improve efficiency and efficacy.
- Review all policy documents, including PJCE Guidebook, Code of Conduct, contract templates, etc., for organizational best practice beginning with highest priority documents.



*Andrew Jones (L) and Marissa Rae Niederhauser. Photo by Seth Nehil.*

*Goal #2: Develop staff and Board capacity and structure appropriate to meet our goals over next two years.*

- Evaluate current Board and staff capacity, determine sequence of priority and set goals for building.
- Evaluate and implement changes needed to ensure administrative and creative staff are correctly classified as employees or contractors in compliance with state and federal standards.
- Staff are provided with professional development opportunities relevant to their responsibilities.
- Develop and implement a formal performance review process for staff.
- Develop and implement a plan for Board recruitment, vetting and onboarding.

*Goal #3: Designate committees of members of the Board of Directors to set policy and do strategic tasks.*

- Determine additional committees as needed, their membership, and respective charges. Adopt a bi-monthly full Board meeting schedule with committees meeting in off-months.

*Goal #4: Develop and implement a plan for leadership transition at the end of FY22.*

- Plan leadership transition including structure and financial resources needed.
- Raise funds for staffing and leadership transition.



*Alex Meltzer (L) and Micah Hummel. Photo by Douglas Detrick.*



## CURRENT STATE

*John Savage (L) and Claudia F. Saleeby Savage. Photo  
by Douglas Detrick.*

PJCE collected and analyzed data regarding our current state through a survey of our artist and audience communities, a SWOT analysis of PJCE's current strategic position, and an analysis of the revenue streams PJCE has cultivated over the last three completed fiscal years.



## *Appendix A: SWOT Analysis of Current Strategic Position*

### **Strengths (internal to PJCE)**

- Recognized as a quality organization with unique mission
- Local and community focused
- Competent, cooperative, and committed leadership (Board and Executive Director)
- Success of Executive Director in both artistic programming and grants development

### **Weaknesses (internal to PJCE)**

- Insufficient resources and over reliance on Executive for multiple roles
- No comprehensive fundraising and revenue growth plan, insufficient capacity to track and grow donors and membership
- Uncertainty of organization scalability and how to achieve sustainable growth
- Lack of diversity among Board of Directors, staff, and artists

### **Opportunities (external to PJCE)**

- Uniquely positioned to respond to need and receptivity of an audience newly hungry for musical experiences
- Local identity, reputation and relationships positions us for increased collaborations
- New delivery methods and platforms can expand our reach and methods of creative presentation
- Artistic creativity and open thinking can drive innovation in how and where we engage our communities

### **Threats (external to PJCE)**

- Unknowns of timing and conditions allowing venues to return to live music
- Uncertainties of audience confidence and behaviors
- Pandemic has challenged very notion of how live music is valued, experienced and presented
- Economic downturn predicts increased competition for grants and fundraising and negative impact on revenue streams

## *Appendix B: Audience and Artist Survey*

PJCE staff conducted a survey in July 2020 to gather feedback about how we can best support our community as it lives through and recovers from the COVID-19 pandemic, and to better understand our community's demographic characteristics. We received 157 responses from a digital mailing of approximately 1,600 (approximately 10% return rate.) This is the first time we conducted a general survey of our artists and audiences. Our survey data reflect our limited advertising budget and resources available to conduct the survey.

Summary of responses regarding future PJCE programming:

- Strong preference for livestream performances in both audience and musician segments compared to talks, panels or discussions. 65% preferred livestream performance, 37% preferred pre-recorded.
- PJCE could expect approximately 33% of our usual audience to attend an event if "safety precautions are followed by PJCE and venue." Could expect nearly 60% "months" after concerts have resumed to attend restrictions on public gatherings have been lifted. 20% will not attend live concerts before receiving a vaccine, but fortunately, no respondents indicated they would "never feel comfortable attending a concert again."
- PJCE's mission seems to be appreciated by the survey respondents: Top three things respondents liked about PJCE's past programming were "Focus on original compositions by local artists," "Quality of musical performance," and "A diverse range of musical styles and artists."
- Top three choices for "biggest challenge facing the Portland jazz community" due to COVID-19 were: "Musicians losing performance opportunities" (67%), "Venues may not reopen" (62%) and "Audiences are uncomfortable attending public events because of possibility of COVID-19 resurgence" (57%).
- For "How can PJCE best support Portland-based artists in the near and long term?" respondents expressed a strong preference that PJCE "Create as many creative opportunities for local artists as possible" compared to creating fewer larger opportunities, fundraising opportunities, or educational opportunities. This preference was even stronger among the artist segment. "Create fundraising opportunities for artists" was a stronger second choice among artists.

## *Appendix B continued: Audience and Artist Survey*


### **Demographic characteristics of respondents.**

To get a better idea of how our artist and audience communities might look or think differently from one another, we split responses into two groups, “Artists” (44 respondents) and “Audience” (113 respondents) according to how respondents self-identified in the survey. “Portland at large” statistics are sourced from 2010 US Census data for Portland, OR.

We acknowledge that our survey data are non-scientific and reflect the limited resources we were able to devote to collecting responses, including email and social media outreach with a very limited advertising budget. Before this survey, we had not attempted to gather this type of data from our community, except in smaller surveys focused on ticket buyers of certain concerts. We had never surveyed our artist community before, and will make this an important part of our “Equitable, broad and inclusive community participation” Strategic Direction area in order to evaluate our progress going forward.



## Appendix B continued: Audience and Artist Survey demographics

	PJCE Artists	PJCE Audience	Portland at large
	<i>By percentage.</i>		
	<b>Age</b>		
Under 18	0	0	18
18-24	4.6	1.8	70
25-34	18.6	3.5	
35-44	25.6	15.9	
45-54	23.3	10.6	
55-64	14	18.6	
65+	14	49.6	12 
	<b>Gender</b>		
Female	34.1	34.5	50.5
Male	56.8	62.8	49.5
Non-Binary	2.3	0.9	
Prefer not to say	6.8	1.8	
	<b>Race</b>		
White	84.2	96.3	70.5
Black or African-American	10.5	0.9	5.8
Latinx, Latino/Latina	5.3	1.9	9.7
Asian or Asian American	2.6	1.9	8.1
Native American or Indigenous	1	0.9	0.7
Native Hawaiian or other Pacific Islander	0	0	0.7
Another Race (or multi-racial)	0	0	5.5
	<b>Income Range</b>		
Under \$15,000	10	3.8	
Between \$15,000 and \$29,999	37.5	12.4	
Between \$30,000 and \$49,999	17.5	20	
Between \$50,000 and \$74,999	20	25.7	Median household income \$60,293
Between \$75,000 and \$99,999	12.5	20	
Between \$100,000 and \$149,999	2.5	14.3	
Over \$150,000	0	3.8	

## *Appendix C: Revenue Analysis Summary*

PJCE conducted an analysis of our revenue streams over the past three fiscal years to determine which revenue streams have been the most significant. Given the extraordinary circumstances of the pandemic, the revenue streams that will be available in the short term are likely to be much different, but as a baseline, the analysis helps us see what has worked for us and how we will move forward with implementing this strategic plan.

- The *From Maxville to Vanport* project, funded by a Creative Heights grant from Oregon Community Foundation, had a huge positive financial impact both initially and over several years. We plan to conceive and implement programs of this scale that have a multi-year life and include educational components.
- Contributed revenue is approximately double of earned revenue; grants are 72% of this.
- Grants are 52% of all revenue categories; specific programs/restricted revenue is 46% of all.
- Program revenue trend consistent, scalable only in doing more events but is not likely to increase net revenue without large growth in audience.
- Main areas for increased revenue appear to be grants and individual contributions (campaign needed for increasing membership, considering tiered supporter contribution structure, etc.)



# WITH GRATITUDE

*Dario LaPoma (L) and Machado Mijiga. Photo by  
Douglas Detrick.*

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