


# Inspiring and Uniting Community Through Music

## STRATEGIC PLAN







This document is a summary of the Strategic Plan approved by the Indianapolis Symphony Orchestra Board of Directors on October 28, 2024.

The Indianapolis Symphony Orchestra is grateful to Lilly Endowment, Inc. for their generous support that made this project possible. The ISO also would like to thank the following for their support in the development of this Strategic Plan:

#### **STRATEGIC PLAN CONSULTANTS**

Schmidt Associates

Schuler Shook

Akustiks

Hunden Partners

Indiana University Public Policy Institute

Arts Consulting Group

For a full list of participants, please see page 34.



# Contents



**PART ONE**  
**INTRODUCTION ..... 5**



**PART TWO**  
**ISO MISSION, VISION AND VALUES..... 7**



**PART THREE**  
**STRATEGIC PLAN GOALS ..... 9**



**PART FOUR**  
**ECONOMIC IMPACT ..... 19**



**PART FOUR**  
**FACILITIES MASTER PLAN .....21**



# 1 PART ONE Introduction



# Inspiring and uniting community into the next century

Leading up to the Indianapolis Symphony Orchestra's 2030 centennial celebration, the ISO is focused on building a sustainable future by innovating in its programs and connecting broadly with the community. As Indiana's largest non-profit performing arts organization, the orchestra welcomes more than 200,000 people to its concerts and educational programs each year. From its Monument Circle home in the heart of Indianapolis, the orchestra serves a growing and dynamic community. The orchestra's influence on the cultural life of the region is undeniable, along with its economic impact. Beloved by audiences for the high quality and variety of its programming, the 76-member professional orchestra is led by two of the most esteemed conductors in the industry, Music Director Jun Märkl and Principal Pops Conductor Jack Everly. Across some 150 concerts and mainstage educational programs over a 12-month season, the ISO provides a rich tapestry of musical programs for all ages and tastes – unified in their artistic excellence and focus on providing inspiring and transformative experiences for audiences.

To ensure a thriving future, the Board of Directors of the Indiana Symphony Society, Inc., the governing body of the Indianapolis Symphony Orchestra, commissioned the most comprehensive planning exercise in many decades. Support from the Lilly Endowment, Inc., enabled the orchestra to engage consultants in strategic planning and facilities planning, including an extensive assessment of our current facilities, infrastructure, and use of space. This work was supported

by an economic impact study and an analysis of changes to the orchestra's business model that could be spurred by improvements to the facilities. During the 2023-24 fiscal year, these consultants conducted surveys, convened focus groups, and interviewed internal and external stakeholders to recommend a path forward that provides a sustainable future for the ISO. The plan was developed with input from a Strategic Planning Committee made up of ISO board members, musicians and staff members, a Community Advisory Committee of business and civic leaders, and focus groups including stakeholders and community members.

The ISO is excited to share our vision for a thriving orchestra that serves as the creative engine of our community. By adopting this strategic plan, the ISO will expand its capacity to serve Central Indiana for the next 100 years.



James M. Johnson, CEO



# 2

PART TWO

## ISO Mission, Vision, and Values



## Mission

The Indianapolis Symphony Orchestra inspires and unites our community through our music.

## Vision

The Indianapolis Symphony Orchestra sets new standards as a dynamic leader in the arts, serving our community by creating innovative, engaging and accessible musical and educational experiences.

## Values

### INSPIRATION

We strive to offer inspiring musical and educational experiences for everyone.

### UNITY

We believe that collaboration makes us stronger.

### INTEGRITY

We will build a culture where everyone is treated with trust and respect.

### STEWARDSHIP

We are committed to sustaining the ISO as a treasured community resource and are committed to its success.

# 3

PART THREE

## Strategic Plan Goals



The Indianapolis Symphony Orchestra will enter its second century in 2030 with a vision to be a dynamic and unifying leader in the arts, serving this community by creating inspiring, innovative, and accessible musical and educational experiences. Through investments in innovative and collaborative programming while providing resources to build organizational capacity, the orchestra will ensure long-term sustainability.

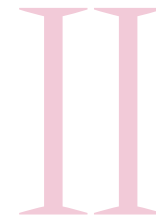
Deepening connections to the community through education and engagement programs that respond to community needs will enable the orchestra to grow audiences while reflecting the vibrancy and diversity of the community it serves. Improving the home of the ISO, Hilbert Circle Theatre, to make it more welcoming and accessible to guests and performers will put the ISO at the center of a vibrant and growing downtown.

## THREE AREAS OF FOCUS AND SEVEN KEY GOALS EMERGE FROM THESE SHARED ASPIRATIONS:



### INNOVATE, COLLABORATE, AND STRENGTHEN CAPACITY

- 1** Expand audiences by investing in innovative programming and marketing.
- 2** Develop artistic partnerships to grow the orchestra's reach.
- 3** Build organizational capacity to achieve long-term sustainability.



### PRIORITIZE COMMUNITY ENGAGEMENT AND ADVOCACY

- 4** Position the ISO as a leader in the arts.
- 5** Heighten impact of education and community engagement.
- 6** Embrace and amplify the vibrancy of our diverse community.



### IMPROVE OUR FACILITY

- 7** Modernize Hilbert Circle Theatre to enhance the experience for guests, community partners and artists.

# I

## INNOVATE, COLLABORATE, AND STRENGTHEN CAPACITY

### 1 STRATEGIC GOAL 1: EXPAND AUDIENCES BY INVESTING IN INNOVATIVE PROGRAMMING AND MARKETING

The Indianapolis Symphony Orchestra is recognized as one of the most versatile and highly regarded orchestras in the United States. The musicians perform a wide variety of music in diverse styles at the highest artistic level and with sincere commitment. The first strategic goal will address the following:

- Expand the audience for classical and symphonic music.
- Partner with schools, universities, and community organizations to offer educational programs that introduce classical music to younger generations.
- Invest in and develop cutting-edge programming that combines classical music with contemporary art forms, such as multimedia performances, cross-genre collaborations, and interactive experiences.
- Foster the creation and performance of new works by living composers, ensuring that the ISO remains at the forefront of musical innovation.





# I

## INNOVATE, COLLABORATE, AND STRENGTHEN CAPACITY

## 2 STRATEGIC GOAL 2: DEVELOP ARTISTIC PARTNERSHIPS TO REACH NEW AUDIENCES

Throughout Indianapolis, there are dozens of creative performing arts and visual arts groups providing many opportunities for the community to engage in the arts. By partnering with the cultural players in our city, the ISO will create compelling multidisciplinary programs that broaden the scope and impact the orchestra's work while diversifying and growing its audience base. These efforts will allow multiple arts organizations to flourish.

Explore partnerships with local creatives, companies, and organizations creating immersive experiences for audiences.

Increase visibility and influence by engaging in conversations about the future of the arts, both within Indianapolis and beyond.



# I

## INNOVATE, COLLABORATE, AND STRENGTHEN CAPACITY

### 3

#### STRATEGIC GOAL 3: BUILD ORGANIZATIONAL CAPACITY TO ACHIEVE LONG-TERM SUSTAINABILITY.

When given the proper tools, training, and a supportive work environment, the people of the ISO are a powerhouse of innovation and achievement, fostering long-term sustainability for the orchestra. A motivated workforce that is empowered to be creative and open-minded will, in turn, lead to innovative programs and partnerships that attract audiences and build more connections in the community. This attracts increased program revenue and philanthropy to ensure sustainable support for the ISO into the future. The third strategic goal will:

- Invest in our employees so that they will make a commitment to invest their career with the ISO.
- Create an environment where staff and musicians are motivated, dedicated and aligned around a shared purpose.
- Develop a culture of trust and respect.
- Invest in tools and training to analyze data that allow employees to make informed decisions.
- Develop a culture of philanthropy: Inspire and empower board members, musicians, staff, auxiliary group members (ISOA, Forte), and volunteers to represent the ISO as ambassadors and advocates.





# II

## PRIORITIZE COMMUNITY ENGAGEMENT AND ADVOCACY

### 4 STRATEGIC GOAL 4: POSITION THE ISO AS A LEADER IN THE ARTS.

As the state's largest performing arts organization and the catalyst for \$37 million in economic activity each year, the ISO can marshal the reputation of the arts sector and downtown businesses to advocate for more resources and visibility for our shared interests. These initiatives include positioning the ISO as a leading voice in the arts by greater participation in local and national arts advocacy initiatives. The ISO can also increase its visibility and influence by instigating conversations about the future of the arts, both in Indianapolis and beyond.

- Demonstrate ISO's contribution as a key civic leader:
- Increase and promote the ISO's contributions to economic development and its role in making Indianapolis an attractive place to live, work and visit.
- Increase participation in city and state public affairs activities.
- Foster thought leadership and innovation in the arts through public forums, panel discussions, and collaborations with academic institutions.
- Lobby and educate local and state officials about the value of the ISO worthy of local and state financial support.



## PRIORITIZE COMMUNITY ENGAGEMENT AND ADVOCACY

# 5

### STRATEGIC GOAL 5: HEIGHTEN IMPACT OF EDUCATION AND COMMUNITY ENGAGEMENT.

From the ISO's founding in 1930 to today, music education and community engagement have played key roles in the orchestra's mission and identity. These programs offer meaningful musical experiences for thousands of people each year. Programs such as Discovery Concerts (attended by approximately 15,000 in 2024) and more focused long-running programs such as the Metropolitan Youth Orchestra, which serves more than 200 children from ages five through eighteen, provide a foundation for youth educational programs. Words on Music, Into the Music, and other programs provide adult learners with lifelong learning opportunities and insight into classical music. Supporters of these programs see a return on investment in the skills development of participants and the goodwill generated in the larger community. These efforts also further engage individuals, building deeper appreciation and support for classical music. The ISO plans to increase investment in music education and community engagement to increase our impact in the future.

Expand educational programs to reach more students, educators, and adults, with a focus on underrepresented communities.

Build partnerships with local organizations, businesses, and cultural institutions to create community-centered events that highlight the role of music in our daily lives.

Offer more free and low-cost events to ensure that music is accessible to all members of the community.

Engage in community outreach programs that bring music to all people, focusing on underserved populations, including schools, hospitals, and community centers.





# I

## PRIORITIZE COMMUNITY ENGAGEMENT AND ADVOCACY

### 6

#### STRATEGIC GOAL 6: EMBRACE AND AMPLIFY THE VIBRANCY OF OUR DIVERSE COMMUNITY.

Indianapolis is becoming increasingly diverse. To represent the city fully and successfully, the ISO must strive to achieve greater diversity in our staff, musicians, volunteers, board members, and patrons. Sustained community engagement work and continued training and improvement of the ISO's people and systems are key in becoming more inclusive and welcoming. We will become a more diverse, inclusive, and welcoming institution to better serve our community.

Elevate centrality of the ISO's DEIB work, including:

Recruit VP of Community Engagement and DEIB.

Intentionally recruit racially diverse candidates to the Board of Directors and administrative staff.

Embrace equitable practices in recruiting, auditioning, and onboarding racially diverse musicians.

Seek partnerships that integrate the ISO into the community.



# III

## IMPROVE OUR FACILITY

### 7

#### STRATEGIC GOAL 7: MODERNIZE HILBERT CIRCLE THEATRE TO ENHANCE THE EXPERIENCE FOR GUESTS, COMMUNITY PARTNERS, AND ARTISTS.

Originally built on Monument Circle in 1916 as a “deluxe movie palace,” the Hilbert Circle Theatre was renovated in 1984 as a concert venue for the Indianapolis Symphony Orchestra. After 1984, the ISO grew its footprint by acquiring Symphony Centre and entering into long-term leases with neighboring buildings. Now, 29,000 residents live in the Mile Square and billion-dollar plans are in the works to bring more industry, housing, retail, dining, and sports options to downtown. An opportunity exists to renovate the theater to make it more inviting and accessible to attendees, offer updated amenities, host events, welcome city visitors, and provide a superior experience for the musicians and community partners who create performances there.

Prioritize renovation projects based on potential to enhance the audience experience, improve operational efficiency, support the ISO’s programming and outreach initiatives, increase community usage, and provide a safe and secure environment for venue users and guests.

Update the auditorium to enhance the artistic experience with a redeveloped orchestra shell, new audiovisual and riser systems, and other enhancements to best showcase the artistic excellence of the ISO.

Upgrade theater entrances and interior spaces to enhance the overall audience experience, including improvements to safety, accessibility for physically diverse patrons, acoustics, seating comfort, sightlines, and amenities such as concessions and new dining options, upgraded restrooms, and other accessibility features.

Design theater building spaces that are flexible and adaptable to accommodate a wide range of programming and events, including performances, rehearsals, educational activities, community events, and rental opportunities.









# 4

PART FOUR

## Economic Impact



The orchestra's influence on the cultural life of the region is undeniable. As part of the strategic planning process, the ISO commissioned the Indiana University Public Policy Institute to conduct a study to determine the economic impact of the ISO's business activities. The study showed a total annual economic contribution of \$37 million to the greater Indianapolis economy, driven by concerts, programming, and operations, plus ticket holder spending in conjunction with attending concerts and programs.

# TOTAL ECONOMIC CONTRIBUTIONS **\$37.2 M**

- Economic Impact  
\$31,626,243  
85%
- Visitor Impact  
\$5,580,197  
15%

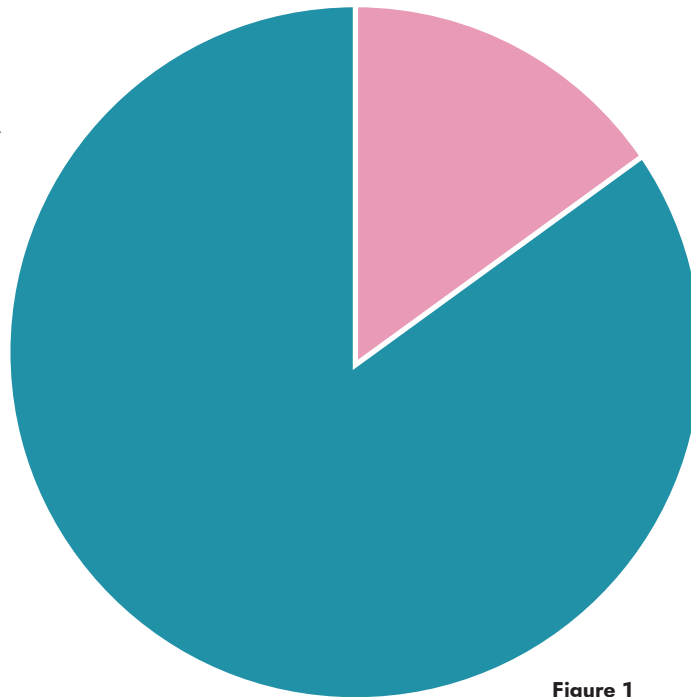


Figure 1

Of this total, AES Indiana *Yuletide Celebration* and Kroger *Symphony on the Prairie* each were responsible for nearly \$5 million of the total economic impact. ISO's revenue resulted in 239 full-time equivalent jobs and total labor income of \$16 million. More than 100,000 annual ISO ticket holders also made significant contributions to the downtown Indianapolis and Hamilton County economies. When they attended an ISO event, they often spent money on parking, food, shopping, and other entertainment. These expenditures bolstered the greater Indianapolis economy by \$5.6 million in 2023.

ISO's signature holiday season event, the AES Indiana *Yuletide Celebration*, alone brought \$1.2 million in spending to the Indianapolis downtown economy in December. In partnership with Conner Prairie, the Kroger *Symphony on the Prairie* series contributed an estimated \$1.4 million to the Hamilton County economy in visitor spending.

ISO patrons who made contributions during fiscal year 2023 indirectly influenced the total economic activity attributable to ISO and its visitors. Each \$100 in patron contributions resulted in \$354 in economic activity connected to ISO events and operations. This patron contribution level also resulted in \$80 in visitor spending, of which \$50 likely occurred in downtown Indianapolis near the Hilbert Circle Theatre. Thus, each contribution by an ISO patron resulted in more than four times that amount in economic value to the greater Indianapolis economy, demonstrating the importance of ISO patrons not only to the organization but also to the economic vitality of the Indianapolis area.



# 5 PART FIVE Facilities Master Plan



At the ISO, we are proud stewards of our 1916 Neo-Classical Revival theater designed by Rubus & Hunter.

The ISO became a pioneer in downtown development when the orchestra made the Hilbert Circle Theatre its home in 1984. Since that time, it has become clear that the theater is falling behind in its ability to provide an excellent experience for guests, a first-class workplace for the ISO's professional musicians, and an attractive meeting space for community groups and businesses looking to take advantage of the theater's central location. Revenues generated by theater rentals and food and beverage income have not kept pace with rising costs to operate the theater, much less contribute significantly to the ISO's bottom line. As a result, the ISO, as a nonprofit organization, must rely increasingly on contributions, endowment income, and ticket sales to fund operations to support our world-class orchestra. Now is the time to re-establish the ISO as a community anchor and economic driver of revitalization while addressing the organization's evolving needs.

In 2023, the ISO undertook a strategic plan and commissioned a facilities assessment and master plan for our campus to address these and other challenges. Our new mission – to inspire and unite our community through our music – also informs our plans for the theater.

## WE ENVISION A REVITALIZED HILBERT CIRCLE THEATRE:

- Become a destination for residents (including 29,000 who live within Mile Square) and visitors alike.

- Provide upgraded facilities to make Hilbert Circle Theatre accessible to all patrons.

- Offer a new space for community groups and event planners seeking a location in the heart of the city.

- Provide the best patron and musician experience possible through new state-of-the-art lighting and sound systems and improvements to onstage acoustics. These changes will allow more performing groups besides the symphony to play in the auditorium, taking advantage of its 1600-seat capacity that places it between the seating size of intimate clubs and larger arenas.

The ISO commissioned lead architects, Schmidt Associates, assisted by theater planning firm Schuler Shook and acoustician Paul Scarbrough, to conduct a comprehensive facilities assessment during the strategic planning process. They interviewed, surveyed, and convened focus groups of ISO musicians, conductors, staff, board members, donors, concertgoers, and community members. The ISO also brought in Hunden Partners to evaluate the potential market for future renovations. In their modeling, Hunden Partners conservatively estimated an increased contribution of \$1.2 million annually to the ISO's operating budget.

# Three imperatives guided this work and will be the lodestar for future renovations:

## 1

The theater facility must provide the flexibility for the orchestra to achieve its vision to be a dynamic leader in the arts, serving our community by creating innovative, engaging and accessible musical and educational experiences.

## 2

The theater facility must become a more significant component to provide financial sustainability for the ISO.

## 3

We must preserve Hilbert Circle Theatre for future generations by addressing risks to its continued functionality.





**PERSPECTIVE VIEW: SCIOTO STREET CONNECTOR (OUTSIDE)**





**PERSPECTIVE VIEW: SCIOTO STREET CONNECTOR (INSIDE)**





**PERSPECTIVE VIEW: NEW ENTRANCE TO HILBERT CIRCLE THEATRE**





**PERSPECTIVE VIEW: COFFEE BAR**





**PERSPECTIVE VIEW: SCIOTO STREET LOUNGE**





**PERSPECTIVE VIEW: MAESTRO LOUNGE**





**PERSPECTIVE VIEW: WOOD ROOM / MUSIC PRESENTATION FUNCTION**



**PERSPECTIVE VIEW: THIRD FLOOR LOBBY**





**PERSPECTIVE VIEW: ROOFTOP EXPERIENCE**





**PERSPECTIVE VIEW: ROOFTOP EXPERIENCE**





**PERSPECTIVE VIEW: ROOFTOP EXPERIENCE**

# Acknowledgments

## STRATEGIC PLANNING COMMITTEE

(B=Board, S=Staff, M=Musicians)

Kiamesha Colom (B)  
 Krystle Ford (S)  
 Sara Galer (S)  
 Sherry Hong (M)  
 Pete Howard (B)  
 Jennifer Janik (S)  
 James Johnson (S)  
 Kevin Lin (M)  
 Greg Loewen (B)  
 Stephanie Hays-Mussoni (S)  
 Yvonne Shaheen (B)  
 Brian Smith (M)  
 Samuel Rothstein (M)

## COMMUNITY ADVISORY COMMITTEE

Dr. Lisa Brooks — Butler University  
 Jennifer Dzwonar — Borshoff  
 Julie Goodman — Indy Arts Council  
 Dr. Tim Hanson — Warren Central MSD  
 Aaron Hurt — Butler Arts & Events Center

Joyce Irwin — Community Health Network Foundation  
 Rev. Gray Lesesne — Christ Church Cathedral  
 Emily Koschnick — Greater Indianapolis Progress Committee  
 Cordelia Lewis Burks — Civil Rights Activist  
 Traci Prescott — IPS Fine Arts Coordinator  
 Taylor Schaffer — Downtown Indy, Inc.

## ALL ISO MUSICIANS, WITH SPECIAL THANKS TO:

Michelle Black  
 Jack Brennan  
 Jennifer Christen  
 Philomena Duffy  
 Jennifer Farquhar  
 Riley Giampaolo  
 Robert Goodlett  
 Sherry Hong  
 Alistair Howlett  
 Austin Huntington  
 Amy Kniffen  
 Anthony Kniffen  
 Vincent Meklis

Mike Muszynski  
 Joseph Ohkubo  
 Ivy Ringel  
 Roger Roe  
 Brian Smith

## ISO STAGE CREW

Alan Alford  
 Patrick Feeney  
 Steven Martin  
 Kit Williams

## FORTE

Andrew Bauman  
 Clark Johnson  
 William Nevins  
 Tim Stephenson  
 Julian Winborn

## COMMUNITY PARTNERS

Jeff Bennett — Central Indiana Community Foundation  
 Phyllis Boyd — IndyParks  
 Abbey Brands — City of Indianapolis  
 Meg Busch — City of Indianapolis

Matthew Carter — Visit Indy  
 Mike Cunningham — Cunningham Restaurant Group  
 Marsh Davis — Indiana Landmarks  
 Paul Diebold — Indiana Department of Natural Resources  
 Aletha Dunston — Develop Indy  
 Chris Gahl — Visit Indy  
 Lourenzo Giple — City of Indianapolis  
 Perry Griffith — Dennison Parking  
 Karen Haley — Cultural Trail  
 Leonard Hoops — Visit Indy  
 Taylor Hughes — Indy Chamber  
 Lisa Laflin — West Indianapolis Development Corporation  
 Melina Kennedy — Central Indiana Corporate Partnership  
 Dan Parker — City of Indianapolis  
 Josh Pedde — Indianapolis Children's Choir  
 Jim Rawlinson — Indiana Economic Development Corporation  
 David Starkey — Indianapolis Opera  
 James Stephens — Music for All, Inc.  
 Jim Staton — AES Indiana



Kara Stolle — Indianapolis  
Chamber Orchestra  
Justin Sufan — AES Indiana  
Suzanne Sweeney — Indiana  
Repertory Theater  
Ashley Thomas — Indiana  
Department of Natural Resources  
Judith Thomas — City of  
Indianapolis

#### ISO FOUNDATION BOARD

John Thornburgh, Chair  
Robert (Bo) Ramsey III, Secretary  
Jill Margetts, Treasurer  
Scott Davis  
Tom Grein  
Martha Lamkin  
Mark Mutz  
Susan Ridlen

#### SUPPORTERS

Trudy Banta  
Jack Bloom  
Doug Day  
Anne DePrez  
Erin Dorsey  
Jack Patterson

Katie Patterson  
Ken Remenschneider

#### ISO BOARD OF DIRECTORS

Greg Loewen, Chair  
Phil Kenney, Vice-Chair  
Christina Bodurow, Ph.D.,  
Secretary  
Eric Sutphin,\* Treasurer  
James M. Johnson, Chief Executive  
Officer

Christina Bodurow, Ph.D.\*  
Kiamesha Colom  
Cheryl J. Dick  
Alexandra French  
Natalie Furney\*  
Matthew Gutwein  
Peter W. Howard, Ph.D.\*  
Phil Kenney\*  
Amy Kniffen  
Liz Kyzr  
Karen Ann P. Lloyd  
Greg Loewen\*  
Bruce McCaw  
Peter A. Morse Jr.\*  
Jackie Nytes\*  
Eloise Paul

Steve Rake  
Samuel Rothstein  
Nicholas Schellinger  
Alice K. Schloss  
Yvonne H. Shaheen  
Christopher Slapak  
J. Albert Smith Jr.  
Justin Sufan  
Eric Sutphin  
Yecenia Tostado  
Tori Weyers  
David Wilcox  
Fred Winters  
C. Daniel Yates

\*Executive Committee

#### BOARD OF TRUSTEES

John M. Mutz, Chair  
Charlene Barnette  
Rollin M. Dick  
Carolyn S. Hardman  
Ann Hampton Hunt  
Kay Koch  
Gordon E. Mallett, Ph.D.  
Charles O'Drobinak  
Dr. Charles H. Webb Jr.



**INDIANAPOLIS  
SYMPHONY  
ORCHESTRA**

Strategic Plan