



POSITION SPECIFICATION

PRESIDENT & CEO

Charlotte Symphony Orchestra
Charlotte, NC



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REPORTING TO:	Board of Directors
DIRECT REPORTS:	Vice President, Development; Vice President, Marketing & Patron Experience; Director, Finance; General Manager; Director, Youth Orchestra Programs
LOCATION:	Charlotte, NC

COMPANY DESCRIPTION

CHARLOTTE SYMPHONY ORCHESTRA

www.charlottesymphony.org

Founded in 1932, and led by internationally renowned Music Director Christopher Warren-Green, the Charlotte Symphony Orchestra's (CSO) mission is to connect and strengthen the Charlotte community through exceptional musical experiences. The CSO currently employs 58 professional full-time orchestra musicians and 24 administrative staff, has created and nurtures two diverse youth orchestras, and offers significant educational programming. The CSO operates with an annual expense budget of approximately \$11 million that is met through a combination of ticket sales, contract income, annual fundraising, and sponsorship. The CSO is governed by a board composed of philanthropists, Charlotte corporate leaders, and musicians from the orchestra.

The CSO is the resident orchestral company client of Blumenthal Performing Arts. Performing across the Charlotte region and beyond, the CSO presents a variety of concert series featuring Classical, Pops, Movie, Family, and special events, such as gala concerts with renowned guest artists. Longstanding *Summer Pops at Symphony Park*, continually voted Best Concert Series in the city, closes each season, and features the annual *Celebrate America* program the first week in July. *On Tap* series at NoDa Brewing Company offers patrons exposure to classical music in a laid-back setting four times per year, as does *CSO On the Go* in Ballantyne three times per year. Building upon a long track record of collaboration, this season the CSO returns as the pit orchestra for Opera Carolina and the CSO is planning a collaborative venture with the Charlotte Ballet.

The CSO actively nurtures the next generation of musicians and music lovers by supporting two diverse youth orchestras. More than half of the CSO musicians are educators in the region, teaching not only the young musicians of the youth orchestras, but students in the residency program at Northwest School of the Arts and in *Project Harmony*, a free, after-school orchestra and personal development program.

The CSO believes in equity and inclusion, and aims to reflect diversity on stage. The *Music For All* program welcomes community members on public assistance to attend any Symphony concert for \$1 per ticket, and the CSO strives to be an industry leader in imaginative, relevant programming by intentionally seeking out female conductors, underrepresented in the industry, and conductors, composers, and guest artists of color. The *Students In Tune* membership program offers the next generation audience \$10 tickets.

The Music Director:

Now in his tenth season with the CSO, Music Director Christopher Warren-Green also serves as Music Director of the London Chamber Orchestra.

Working extensively in North America, key engagements have included The Philadelphia Orchestra, the Detroit, Houston, St. Louis, Toronto, Milwaukee, Seattle and Vancouver symphony orchestras, the Minnesota Orchestra and Washington's

National Symphony Orchestra. Elsewhere he has been seen at the helm of the Philharmonia, London Philharmonic, Royal Liverpool Philharmonic, Orchestre National de Belgique, Iceland Symphony, Beethoven Orchester Bonn and NHK, Tampere Philharmonic, Singapore, Sapporo and KBS symphony orchestras.

Warren-Green was personally invited to conduct the orchestra at the 2018 Royal Wedding of Prince Harry and Ms. Meghan Markle. Past royal engagements have included the marriage ceremony of TRH The Duke and Duchess of Cambridge at Westminster Abbey in 2011 and the Service of Dedication and Prayer following the marriage of TRH the Duke and the Duchess of Cornwall in 2005. Other notable occasions have included HM The Queen's 80th birthday celebrations at Kew Palace, among others.

A product of community music education, Warren-Green plays a key role in the Charlotte Symphony's educational efforts, including two youth orchestras and Project Harmony. In London he works with LCO's Music Junction program, which gathers together young people from different backgrounds to create mutual empathy and connection through music.

Warren-Green is a fellow of the Royal Academy of Music and has recorded extensively for Sony, Phillips, Virgin EMI, Chandos, Decca, Deutsche Grammophon, and Signum Classics.

The City:

Charlotte is one of the fastest growing metropolitan areas with nearly 100 people a day becoming new residents. They come for jobs in a healthy and growing economy with thriving health care, finance, and professional services sectors, and a tech talent pool growing twice as fast as the national average. They come to start and grow businesses in a region with an educated, talented, and innovative workforce, regularly ranked in the top three places to start a business. They come for lower cost of living and affordable real estate in neighborhoods fit for any lifestyle – from vibrant urban centers, to suburban cul-de-sac to quaint small towns and rural areas. Not to mention 226 days of sunshine a year. Charlotte has the fifth-busiest central business district in the U.S. for office construction and is the 10th-busiest metro area for housing permit activity. The most important result of all this development is an influx of new talent, residents, and visitors. As more people become part of this place, the region continues to grow its capacity to innovate, engage, and entertain.

SCOPE AND RESPONSIBILITIES

Reporting to the Board of Directors, the President & CEO will direct, plan, and evaluate the business activities of the Charlotte Symphony Orchestra (CSO). The President & CEO will work closely with and support the vision of the Music Director to ensure that the highest quality music is presented – the President & CEO will provide ideas, options, and opportunities for the Music Director to realize the artistic potential of the orchestra within the budgetary realities of the business plan. The President & CEO will work collaboratively with all internal stakeholders to ensure the future health and financial sustainability of the orchestra. The President & CEO will be the key external representation and spokesperson of the CSO to many of the major individual donors, the business community, philanthropic and community partners, media and to the government. The President & CEO will work directly with the heads of marketing, fundraising, and artistic programming to maximize the business and artistic products.

In 2017, a turnaround plan was initiated by the CSO. Since that time, the CSO has eliminated the debt and finished the season with a surplus the last two years. The musicians are under contract until 2021. Community engagement activities have expanded significantly, resulting in wider visibility, increased awareness, and the start of new funding. Both a planned giving fund and a board-designated reserve fund have been established, and the addition of an annual opening night gala has netted additional six-figure contributions to the annual fund. There has been a 26% growth in ticket revenue over the past two seasons. Building off these efforts, the CSO seeks to achieve financial sustainability by 2021. Critical to achieving financial stability, the President & CEO, will develop and execute a strategic plan to accomplish the following objectives: optimize the earned revenue potential of the orchestra, thus securing a more sustainable business model; work with a Board subcommittee to establish a permanent endowment, cash reserve, and innovation fund; balance the programming and marketing to achieve the Music Director's artistic vision and attract audiences; continue to expand community engagement offerings and increase the orchestra's visibility and relevance across Charlotte.

Specific Responsibilities:

- Lead a strategic planning initiative that will examine the long term health and direction of the orchestra;
- With the Music Director, Board Chair, and Finance Committee develop the annual budget and set policies that result in sound fiscal management and operations;
- In collaboration with the VP of Marketing & Patron Experience, the Music Director, and the General Manager, oversee the season planning and implementation of a long term, strategic marketing effort that will capitalize into increased subscription and individual ticket sales, special concert events, and other income earning opportunities for the orchestra;
- With the assistance and collaboration of the VP of Development, become the front-line fundraiser for the organization;
- Partner with the General Manager to ensure the orchestra has the tools and opportunities to achieve artistic success within budgetary parameters, including individual and collective matters such as union contracts and labor activities;
- Bring new ideas, energies, programs, and initiatives while respecting the symphonic orchestra tradition;
- Represent the CSO externally throughout Charlotte and the metropolitan area and, along with the Music Director, act as a visible spokesperson for the orchestra;
- Position the CSO as a catalyst for engaging future generations of music lovers; maintain and extend the CSO's nationally recognized education and community engagement programs guided by the Director of Education and Community Engagement; work with the Director of Youth Orchestra Programs to continue development and expansion of Youth Orchestra programs;
- Work closely with the Board Governance Committee to recruit and introduce new board members to the CSO and ensure current Trustees remain engaged;
- Oversee the hiring and management of the administrative staff through supervision of the department heads;
- Support and strengthen the CSO culture of collaboration among musicians, board, staff, volunteers and affiliates;
- Sustain the CSO's commitment to inclusion and diversity, equity, and inclusion as critical to the future success of the organization;
- Through example, ensure that the CSO is a continual learning organization, striving for excellence in all of its internal and external activities;
- Communicate regularly with professional colleagues in the Charlotte arts community and share information and current trends involving American symphony orchestras;
- Keep current with existing and emerging artists and repertoire.

KEY SELECTION CRITERIA

Qualified candidates for the President & CEO of the CSO will have at least ten years' combined experience in marketing, development, business management, and staff leadership in the arts and will have a passion for classical music. The successful candidate will have demonstrated ability to operate in a bifurcated leadership structure and strategically position an organization toward financial sustainability.

The President & CEO will demonstrate a strong ethical core, human resource and people skills, emotional intelligence and self-awareness to gain the trust of the Board, inspire the staff and musicians, and develop a rapport with the Music Director. He or she must lead with vision and maintain this vision to face challenges and to achieve the best solution that will ultimately lead to long-term financial stability.

The President & CEO, working in close collaboration with Board leadership, will have the ability to state the value proposition of the CSO as an artistic, cultural, community, and civic asset and will have the ability to solicit funds and win major contributions to support the organization. The successful candidate will also have a demonstrated ability to identify and develop alternative revenue streams, grow and develop new audiences, and continue to build and strengthen the brand of the organization. A demonstrated creative approach to business management, to development and implementation of new ideas, projects, and initiatives, and an entrepreneurial approach to experimentation are essential.

The successful candidate will have the proven ability to balance artistic and financial decisions. The President & CEO will also have the ability to reach consensus among forces with seemingly different needs and ultimately to make decisions for the long-term benefit of the stakeholders.

A knowledge of the classical music repertoire is a plus; a love for the art form is a must.

PERSONAL / PROFESSIONAL ATTRIBUTES

- Collaborative negotiator with the ability to support and influence the Music Director
- Charismatic leader with ability to inspire and unify teams
- Approachable manager with appropriately transparent communication style
- Visionary thinker combined with a practical approach to problem solving
- High emotional intelligence with keen understanding of the relationship between an artistic director and a CEO
- Strategic mind with openness to innovation and creativity
- Comfortable and confident as the face of an organization, visible in the community
- Impeccable personal ethics
- A belief in and alignment with the CSO's values of Patron Service; Community; Diversity, Equity, and Inclusion; and Relevance

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