

Succession Planning at Art of Élan

TEACHER NOTES

Learning Objectives

- Evaluate an arts organization's portfolio of activities.
- Define succession planning and discuss steps an organization can take to ensure its sustainability.
- Recognize the choices a leader can make to bolster the long-term viability of an arts organization.
- Assess the components of a strategic plan.

Topics For Discussion

Programming and Partnerships

San Diego-based chamber music presenter Art of Élan was founded by members of the San Diego Symphony in search of a musical outlet that could reflect the diverse cultural life of the city. Through the art of chamber music, the small arts organization has aimed to commission new works, offer distinctive performance venues (museums and galleries, for example), and forge connections with a wide array of audiences.

- Art of Élan programs defy typical concert length. Its offerings are usually not more than an hour and performed without intermission. Ask students to discuss the advantages of this approach to program presentation.
- The group is further known to mix classical and contemporary musical works routinely in performance, in this way resisting some of the expectations of chamber music. Invite students to examine some of Art of Élan's programs from its [press kit](#). What programs were particularly well received by audiences and the press?
- Partnerships have been critical to Art of Élan's mission of developing diverse audiences. Youth-centered initiatives such as the ten-week residency program "Young Artists in Harmony" with A Reason to Survive (ARTS) and the Emerging Leaders Program for music students at Mira Mesa High School in San Diego have not only brought the organization into contact with tomorrow's audiences and musicians but also made professional musicians and leaders available to particular at-risk and low-income communities. What other initiatives involving diversity and cultural exchange did the case highlight? Gather students' impressions of these long-term education programs that run outside of the concert season. Which seem to advance the mission of Art of Élan most effectively?

Succession Planning

The case of Art of Élan concludes with Kate Hatmaker facing a decision about her role in the future of the arts organization she co-founded. The scenario follows an important discussion on the issue of succession planning. Succession planning involves arrangements that an enterprise makes to transition its executive leadership over time. The term applies to all types of businesses but can be particularly urgent and acute in those operated by their founders. An organization can scarcely rest on a single individual, because if that person is incapacitated, the institution may not survive. For the health of the company in the long run, plans are put in place to articulate how the business will function in the absence of its leaders. As the case revealed, almost two-thirds of not-for-profit organizations do not have a written plan for unexpected departures of its top leaders.

- Surrounding oneself with stakeholders invested in the long-term health of the business is a necessary step toward planning for executive transitions. What relationships are in place at Art of Élan and what pitfalls do students foresee in the structure of the organization?
- What steps has Hatmaker taken with James Robbins, board president of Art of Élan, to ensure the viability of the group for the long term? What further actions need to be taken?
- From what is given in the case, what would happen to Art of Élan if Hatmaker were not able to act as its executive director and artistic director?
- At present, Hatmaker is a member of Art of Élan's board of directors, in addition to her executive roles. This is not uncommon in very small organizations. Explore with the class the conflicts of interest and other problems that this arrangement might pose for the organization.
- The case concludes with Hatmaker at a professional crossroads. She could continue with the three roles she assumes currently at Art of Élan (executive director, artistic director, and director of community engagement), but she was also due to give birth to her second child in a few weeks. Could she walk away from Art of Élan entirely, or for a short time? She also continued to hold a full-time position with the San Diego Symphony. What should be done with that part of her career, which represented steady income?
 - ♦ The San Diego Symphony offered its players a one-year sabbatical opportunity, which could allow Hatmaker to focus on Art of Élan more narrowly. If Hatmaker were still looking to draw down her responsibilities with Art of Élan, which of her three roles might she prioritize for now? How would the other positions be covered or filled and how could Hatmaker best assist with transition plans?
 - ♦ Survey student responses to this central case question as Hatmaker prepares for a meeting with Board President Robbins. Encourage students to think about the problem in both the short and long term.

Strategic Planning

Kate Hatmaker's decision with her own career path and the succession plan of Art of Élan are bound up with a larger draft of a strategic planning document, which she developed with James Robbins. The case walks through the major areas addressed in that plan, which are given in full in **Appendix 2**. Ask the students to review this document closely. Divide them into groups to discuss the various goals proposed for the short and medium term, which could become the basis for a more formal five-year strategic plan. The case focused on efforts to stabilize and sustain Art of Élan, even though the document does raise the question of audiences served and artistic goals.

- In the area of strengthening governance, two objectives were proposed: (1) develop a “board manual to orient and clearly state expectations for board members” and (2) increase board to 12 members with diverse representation. What are the advantages of a board manual? To increase diverse representation, Hatmaker and Robbins suggested three target groups—young professionals, women and minorities; and corporations. What could members of these target groups contribute to Art of Élan's board of directors? How realistic are these objectives?
- Financial sustainability was the other key item under review in the case. Hatmaker and Robbins aimed for growth of 20% each year for three consecutive years in the planning document. A number of ideas were put forward for increasing revenue (earned and contributed). Targets for grant submissions were also set. Invite students to chart the proposed components to achieve financial stability and to assess the viability of each suggestion.