

# 2016 CALASTA STRATEGIC PLAN

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## PREFACE

The California American String Teachers Association (CalASTA) represents a tapestry of constituents including teachers and students; composers and performers; makers and shopkeepers; and enthusiasts and amateurs each woven together by a common thread, an enduring interest in stringed instruments. The key to unlock the beauty and power that resides in our tapestry is to identify the needs, interests and aspirations of our varied constituents in order to serve, promote and celebrate each of those interests.

The 2015 Strategic Planning Committee (SPC) developed a list of four areas of opportunity to strengthen CalASTA as an organization. The plan presents a blueprint to realize those opportunities. For each of the targeted areas (Budget, Officers' Manuals, Solo Competition, and Membership) the SPC presents a rationale for CalASTA Board action with detailed suggestions and programs for effective inclusion and implementation within CalASTA Board priorities.

The SPC was given the task to dream – dream the future of CalASTA. We are all asked to dream greatly as CalASTA cannot soar higher than our collective vision nor greater than our collective values. Let us continually set standards beyond what we can presently see, well beyond the next leadership rotation. The future of CalASTA calls us to renewed efforts and even greater hope!

The process of working together with people of like interest to create opportunity and promote the love of music through stringed instruments may be as valuable as the actual specifics of the plan. The SPC committee hopes through this process the CalASTA Board will use this document to help guide and shape future opportunities for all who love, and more importantly, for those who will come to love stringed instruments.

**Disclosure: The structure, many contextual elements and even some phrases were borrowed for this report from "American Viola Society Report of the Strategic Planning Committee May, 2012". The American Viola Society strategic planning team was led by and the report was written by Dr. Thomas Tatton**

## **PREAMBLE**

To ensure our organization remains focused and on track a periodic review of our mission statement and purpose is critical. As our organization grows so will the scope of our opportunities. Solidifying and articulating our sense of mission, purpose and holding to our core values will shape the CalASTA decision-making process going forward. Further, our foundation will be much stronger and the coordinated program of CalASTA activities more coherent if all actions are shaped to match our stated mission, purpose and values.

## **Our Mission**

The mission of the California Chapter of the American String Teachers Association is to promote excellence in solo string, chamber, and orchestra playing and teaching. We pursue this mission through an open sharing of ideas, benefits, services, and activities responsive to the musical needs of all members and their students. This is accomplished by the development of strong and active Section leadership, enhancement of the image and visibility of string teaching and study, advocacy for string education through communication and cooperation with other music advocacy organizations, and fostering an inclusive community of string teachers, players and their students. We will fulfill this mission by embracing and inspiring our membership and by welcoming, empowering and serving their string related aspirations.

## **Purpose**

Specifically the purpose of CalASTA shall be:

- a. To publicize, promote and participate in the performances, conferences, advocacy, and publications of national ASTA
- b. To publicize, promote, and celebrate the activities of our Sections throughout California
- c. To serve as a resource of string related opportunities in California
- d. To promote the highest standards of string pedagogy and performance through continued improvement and development of our Solo Competition
- e. To provide leadership a forum for the discussion of the programs and activities of the CalASTA Sections through our bi-annual board meetings
- f. To act as the liaison for the dissemination of information from national ASTA
- g. To function as a fiduciary in handling monetary activities including payments and distributions.

## Core Values

An articulated set of core values supporting the mission and purpose of CalASTA completes the necessary guidelines for decision-making within our organization. As opportunity and challenges arise it is the power of these tools, effectively embedded in our organization that will provide the decision-making parameters to resolve issues and confidently welcome opportunities.

Fostering the bonds among all string players, teachers and students

- Encouraging section activities
- Providing a vehicle for networking at section, state and national levels
- Partnering with sister organizations including CODA, CMEA, MTAC and the Suzuki Association
- Reports in *The Soundpost*
- Los Angeles and San Francisco section style events titled “Meet and Greets”

Providing opportunities for individual growth and recognition

- Encouraging and promoting leadership within our sections
- Identifying potential leaders for section and state activities
- Highlighting member accomplishments at the state and national levels
- Celebrating our “stars” with periodic awards ceremonies

Supporting artistic performance and expression through pedagogy

- Engage students and teachers in section, state and national solo competitions
- Promote ASTACAP
- Celebrate outstanding teachers, wherever and whenever possible.

Stewardship

- Announcing and supporting string related activities of interest to our membership
- Participating in music advocacy wherever and whenever possible, i.e., Stand-Up-4-Music
- Maintaining our history by having an Historian on our state board
- Preserving and celebrating our history through articles in *The Soundpost*
- Membership recruitment

Encouraging teaching and learning

- Section activities including chamber music
- Participation in annual CASMEC conferences
- San Francisco section style “Practicums”
- San Francisco and Los Angeles section style grants

# FINANCIAL DEVELOPMENT/BUDGET

Fiscal development is a plan for raising funds organized and designed to maintain a high level of opportunity for all CalASTA members. The effort to create and implement, on a continuous basis, a robust development system will require constant, consistent and diligent attention, continuous examination of our CalASTA culture plus a considerable amount of courage.

A development plan needs to follow our mission, purpose and values. Failing that, CalASTA will take care of the day-to-day tasks, solving one problem at a time without looking boldly into the future. Actions taken today to secure the fiscal health of CalASTA will pay dividends in the opportunities of our tomorrows. CalASTA leadership should keep in mind that the real strength of our organization lies in our members. If we are aware of and willing to tap that strength our members will step forward and help create the bright future we all seek and desire.

## **The First Step – Create a Budget**

Our organization must know “Why” it exists and what it hopes to accomplish. This is articulated through our mission and purpose statements. The Strategic Plan helps define the “How” our organization plans to achieve that mission and purpose. A budget, an adjustable financial game plan, ensures our CalASTA resources are thoughtfully deployed and used to support our mission and purpose. It means budgeting toward that mission and purpose. If CalASTA leadership stays focused on budget vis-à-vis our mission and purpose it will guide leadership to spend our resources wisely and efficiently.

## **Sample Budget, Fiscal Year 2016-2017 (July 1 – June 30)**

### **INCOME**

**National Rebate**

	2015-16		2016-17
Q1 (July to Sept, posted in Oct.)			
Q2 (Oct to Dec, posted in Jan.)			
Q3 (Jan to Mar, posted in April)			
Q4 (April to June, posted in July)			

**Grants/donations/Company sponsorships**

	2015-16		2016-17
Listed			

**Soundpost Ads** – Listed. (If the AD revenue comes in on a calendar basis, divide appropriately and note)

	2015-2016		Proposed 2016-17

**Web Site Sponsored Tiles** (If the tile revenue comes in on a calendar basis, divide appropriately and note)

	2015-16		Proposed 2016-17

**Miscellaneous** – Listed

	2015-16		Proposed 2016-17

Totals:

	2015-16		Proposed 2016-17

# Expenses

**Section Rebates**

Fresno 2015-16	2016-17	2016-17 Actual
Q1		
Q2		
Q3		
Q4		

Los Angeles 2015-16	2016-17	2016-17 Actual
Q1		
Q2		
Q3		
Q4		

Sacramento 2015-16	2016-17	2016-17 Actual
Q1		
Q2		
Q3		
Q4		

San Francisco 2015-16	2016-17	2016-17 Actual
Q1		
Q2		
Q3		
Q4		

San Diego 2015-16	2016-17	2 016-17 Actual
Q1		
Q2		
Q3		
Q4		

Stockton 2015-16	2016-17	2016-17 Actual
Q1		
Q2		
Q3		
Q4		

State Solo Competition	2015-16	16-17 Proposed
Monetary Awards (even years)		
Competition Expenses (odd years)		
1. Hall/room rental		
2. Certificates		
3. Judges		
4. Lunch, etc		

Meeting Expenses	2015-16	2016-17 Proposed
Meeting 1 Date: Meals/ Attendees Expenses (travel/ incidentals)		
Meeting 2 Date: Meals/ Attendees expenses		

ASTA National Conference	2015-16	2016-17
CalASTA pays for two of the possible four years of leadership service for the president and the president elect Registration/ Travel		

Coalition/Advocacy Expenses	2015-16	2016-17
Institutional Membership		
Representative's Costs Travel:/Meals/Lodging, misc.		

Website	2015-16	2016-17

Site Host –Jonas Music Services		
Miscellaneous expenses		

<b>Recognition Awards</b>	2015-16	2016-17
Plaques		
Other		

<b>Special Projects Fund</b>	2015-16	2016-17
Money available to promote CalASTA, activities, e.g., first event for a new section, e.g. \$_____. Board approval required. List and briefly explain		

<b>Officers' Expense Account</b>	2015-16	2016-17
Money available for incidental officer expenses, e.g. travel, meals, mailings, etc. Up to \$400. \$_____. List and briefly explain		

## LEADERSHIP MANUALS

In our contemporary world most general, necessary and critical information is transferred via computer: websites, drop-down menus, links, E-blasts and emails. Such is the case with ASTA. Instructions for state chapters are found in the ASTA site under “*State Leadership Resources*” and a link titled “*State Chapter Handbook*”. Included are several pages of helpful, general and critical information. These are available at:

[www.astaweb.com/](http://www.astaweb.com/)

*Member Resources – Drop-Down menu to:  
State leader Resources – link to:  
State Chapter Handbook*

For CalASTA, general descriptions for each elective office and most appointed offices are found in the Bylaws. Particular pieces of often critical information are handed down to each leadership team orally, sometimes left unsaid, but in a less than organized manner.

In order to grasp the fullness of CalASTA and particular leadership responsibilities it is important that CalASTA create “*CalASTA Leadership Manuals*”. These manuals are to be considered “living” documents and thus adjustable to be reviewed periodically and updated. Bullet points best organize some manuals; others, such as the president and treasurer’s manuals are best organized by the fiscal year.

The 2015 SPC deemed it important to start with both printed and computer based manuals that describe the duties, responsibilities and obligations of the CalASTA: President, Treasurer, Webmaster, *Soundpost* Editor, and Insurance Representative.

### President’s Manual

July

- Q4 (April – June) rebate check mailed from national. (The president receives the check along

with the raw numbers for each section so that the Treasurer can calculate the amount of CalASTA's rebates and send a check to each of the six sections)

#### August

- August 10 – Chapter News Submission for inclusion in the Nov. issue of AST (not mandatory)
- Aug 15 – Treasurer's Report due to national for the 6 months ended on June 30. Treasurer's responsibility
- Traditional month for the second bi-annual state board meeting
- Target date to mail *The Soundpost* to membership

#### September

#### October

- Q1 (July- Sept.) Rebate check mailed from national
- Traditional month for the State Solo Competition – even numbered years.

#### November

- 11/10 Chapter news Submission for inclusion in the February issue of AST
- 11/15 990-EZ form to IRS (Check with the Treasurer)

#### December

- State Chapter Commercial Liability Insurance Election form is due. (The form is found in the ASTA State Chapter Handbook) It is sent to the Membership Coordinator/Chapter Liaison – currently Amanda Bernhardt – 4155 Chain Bridge Road, Fairfax VA 22030
- The Exemption from Federal Income Tax under Section 501 (c)(3) due to the Membership Coordinator – Amanda Bernhardt. This form is found on the same page as the Insurance Liability form. Each is very easily filled out.

#### January

- Q2 (Oct-Dec) Rebate Check mailed from national
- Target date to mail *The Soundpost* to membership

#### February

- 2/10 Chapter News Submission for inclusion in the May issue of AST
- 2/15 Treasurer's report due for the 6 months ended December 31
- CASMEC Conference. CalASTA organizes with CBDA an Exhibit Hall booth, string related sessions organized in coordination with CODA and, in odd numbered years, organizes produces with CODA the *Showcase Recital* of the previous winners of the State Solo Competition.
- Traditional month for the first bi-annual state board meetings

#### March

- ASTA National Conference. Two CalASTA leaders (President and President Elect) are subsidized – travel and registration – to attend. One or both should sign up for the "*State Leadership Session*" With regard to budget – a state leader may be subsidized only twice in the possible four years.

#### April

- Q3 (Jan-March) Rebate Check is mailed from national

#### May

- 5/10 Chapter News Submission for inclusion in the August issue of AS

#### CONTACTS:

- **CODA President – Donna Harrison:** [harrison.donna3@gmail.com](mailto:harrison.donna3@gmail.com)

- **CMEA Administrative Officer –Trish Adams**  
Office 559-587-2632; cell 559-904-2202  
E-mail: [cmea@calmusiced.com](mailto:cmea@calmusiced.com)
- **CMEA President –Scott Hedgecock** (Term from 2016-2018)  
Work: 714-626-3984; E-mail - [scotchdir@aol.com](mailto:scotchdir@aol.com)
- **ASTA Chapter Liaison**  
703-279-2113; E-mail - [asta@astaweb.com](mailto:asta@astaweb.com)

## **Insurance Representative Manual**

Current Representative is Gayane Korkmazian – [korkyhome@att.net](mailto:korkyhome@att.net)

The Insurance Representative acts to assure all sanctioned CalASTA events are properly insured. CalASTA protocol requires all requests for ASTA Liability Insurance originate from the CalASTA Insurance Representative.

The following required information is to be sent to the Insurance Representative **four to six weeks in advance** to assure receiving the insurance form(s) in ample time for the event(s):

1. Name, address, e-mail address and phone number of the sponsoring person requesting the insurance
2. Date and brief description of the event and estimated attendance.  
Name and e-mail address of the contact person for the venue if not the person named above
3. If the insurance certificate(s) is needed by a certain date indicate that date on/in your request. If a specific date is not indicated one can reasonably expect to receive the insurance certificate about two weeks prior to the date of the event
4. Copy of contract with the venue showing their insurance requirement IF AVAILABLE as requested by the insurance company
5. Name and e-mail address of the contact person for the venue if not the person named above

This procedure assures that all CalASTA sanctioned events are properly tracked and covered and that an individual CalASTA member cannot request insurance for private purposes.

The CalASTA Insurance Representative is the only sanctioned person allowed to work with the ASTA sponsored Insurance Agency.

Huntington T. Block Insurance Agency, Inc.  
Pidon Sok – Insurance Representative  
202-862-5346  
[piden.sok@aon.com](mailto:piden.sok@aon.com)  
Richard V. Mercado, Vice President  
[richard.mercado@aon.com](mailto:richard.mercado@aon.com)



## Webmaster Manual

The Webmaster position supports a crucial communication tool of CalASTA. Through our Webpage and the E-blast capability CalASTA can instantly contact 85% of our membership. Thus, we have both a Webmaster and an Assistant Webmaster. Currently they are:

- Webmaster Kimberly Cole Feeney – [kfeeney@djustd.net](mailto:kfeeney@djustd.net)
- Assistant Webmaster Yu-Ting Wang – [yuting.cello@gmail.com](mailto:yuting.cello@gmail.com)

Our web host is: Jonas Music Services

PO Box 589

Wallkill, NY 12589

1-800-897-1774

[clientsupport@jonasmusicservices.com](mailto:clientsupport@jonasmusicservices.com)

Dr. Ann Lathan Kerzner, Executive Director

In order for another CalASTA member to be authorized to use this tool there is a one-hour training session offered by Jonas Music Services. The Webmaster sets up any training. There is a nominal fee to CalASTA.

Information on the **homepage** should come from the state president. Information on **section** pages should come from the section presidents. CalASTA members may post a web page with “name only” on the “Links” tab. Send **all** information to the Webmaster for posting.

**No persons other than the Webmaster and the Assistant Webmaster are authorized to post information.**

### Webmaster Duties

- Keep the homepage updated regarding officers, upcoming conferences, state competition information, state newsletter, Bylaws, etc. as needed. Load any other information such as “elections”, “Special Opportunities”, etc. as directed by the state president.
- Send out reminders to Section Presidents for updated officer and contact information about twice and year.
- Be on a continuous search for tile advertisers. This is how we pay for the webpage. Keep a record of payment, send out reminder invoices as needed and monies received are sent to the CalASTA Treasurer.
- Send out “E-blast” announcements as directed by the State President.

## Treasurer's Manual

The CalASTA Treasurer is clearly the linch-pin of our organization and is vested with multiple responsibilities some of which are, until now, less than transparent. This person is charged with the financial management of the operation of all CalASTA activities in order to fulfill our mission, purpose and values in the most effective and efficient manner. It must be noted that the Executive Board of Directors is ultimately responsible for the financial management of all CalASTA activities.

### General Duties include:

- Maintenance of the CalASTA bank account  
(Bank of America, North Natomas, Sacramento branch)
- Receive, disperse and account for all funds
- In cooperation with the President, develop an annual budget (July 1 – June 30 budget year)
- Periodically compare actual revenue and expenses incurred against that budget and report findings to the Executive Board biannually
- File all required reports

### Specific Duties Include:

- Receive and deposit quarterly rebate checks from national ASTA
- Receive and deposit checks forwarded from *The Soundpost* editor (payment from The advertisers)
- Receive and deposit checks forwarded from the Webmaster (payment for advertising tiles on the CalASTA Webpage)
- File reports as outlined below – FTB, IRS, and ASTA

### Normal and Recurring Expenses Include:

- Rebates to CalASTA Sections (the total equals one half each national rebate check)
- Payment of expenses incurred for each of CalASTA's biannual meetings
- Payment for expenses incurred for the production of *The Soundpost* and the operation of the Webpage.
- Expenses incurred by the biennial Solo Competition
- Payment of the incidental officer expenses up to \$400.00 per year.

### Expenses requiring Executive Board or the President's approval include:

- Expenses for collaborative activities including such programs a CMEA sponsored Stand-Up-4-Music
- Special Projects Funds
- Other Executive Board approved project expenses

**Future issues that need to be addressed and policies developed by the Executive Board in cooperation with the Treasurer include:**

- Address the legal vulnerability to the entire board and CalASTA itself. Evaluate the need for Board and Directors Liability Insurance and follow through with securing same
- Create a reporting process for more transparency to insure open and constant lines of communication between the Treasurer and the Executive Board of Directors about sound financial policies and procedures on budget oversight
- Develop a plan to more fully realize the fiscal and financial opportunities available to CalASTA (See Future Strategic Planning Opportunities, p. 22)
- Develop a policy regarding conflict of interest issues.

**Fiscal Year Dates (July 1 to June 30)**

- **August 15 – Six-month Treasurer’s Report (January through June) due at National**
- **August (mid-month) - Treasurer’s Report for Chapter Board Meeting**
- **August (late-month) – Deposit 4QFY rebate from National and issue Section checks**
- **October (late-month) – Deposit 1QFY rebate from National and issue Section checks**
- **November 15 – Deadline for filing IRS Form 990-N and California FTB Form 199-N**
- **December 31 – Annual Tax Exemption form due at National**
- **January 31 – Deadline for sending IRS Form 1099 to individuals and vendors**
- **February 15 – Six-month Treasurer’s Report (July through December) due at National**
- **February (mid-month) - Treasurer’s Report for Chapter Board Meeting**
- **February (late-month) – Deposit 2QFY rebate from National and issue Section checks**
- **February 28 – Deadline for sending IRS Form 1099s to IRS**
- **April (late-month) – Deposit 3QFY rebate from National and issue Section checks**

**Treasurer’s Reports**

Due dates:

February 15 (for 6 months ending December 31)

Use form at:

[http://www.astaweb.com/App\\_Themes/Public/DEC31%20Treasurer%20Report.xls](http://www.astaweb.com/App_Themes/Public/DEC31%20Treasurer%20Report.xls)

August 15 (for 6 months ending June 30)

Use form at:

[http://www.astaweb.com/App\\_Themes/Public/JUNE30%20Treasurer%20Report.xls](http://www.astaweb.com/App_Themes/Public/JUNE30%20Treasurer%20Report.xls)

### **Exemption from Federal Income Tax Under Section 501(c)(3)**

The IRS requires that the American String Teachers Association, Inc., annually update the subordinates information for those chapters choosing to be included in the 501(c)(3) group exemption. In an effort to provide the most up-to-date information to the IRS, please complete the form found here:

[http://www.astaweb.com/App\\_Themes/Public/ChapterTaxInsuranceForm.pdf](http://www.astaweb.com/App_Themes/Public/ChapterTaxInsuranceForm.pdf).

### **IRS 1099 Forms**

All persons or contractors earning more than a total of \$600 in the previous calendar year from the state chapter must receive a Form 1099. This applies only to persons or vendors receiving payments, not reimbursements. These forms are due to individual(s) no later than January 31 of the following year and to the IRS no later than February 28 of the following year. For more information on the 1099 process, please visit <http://www.irs.gov/Businesses/Small-Businesses-&Self-Employed/Forms-and-Associated-Taxes-for-Independent-Contractors>

### **IRS Form 990 E-Postcard**

Small tax-exempt organizations with annual gross receipts that are normally \$50,000 or less are required to electronically submit Form 990-N, also known as the e-Postcard, unless they can file a complete Form 990 or Form 990-EZ. Filing instructions can be found at:

<https://www.irs.gov/Charities-&Non-Profits/Annual-Electronic-Filing-Requirement-for-Exempt-Organizations-Form-990-N-e-Postcard>

### **FTB Form 199-N**

California small tax-exempt organizations with annual gross receipts that are normally \$50,000 or less must electronically submit Form 199-N. Filing instructions can be found at:

[https://www.ftb.ca.gov/businesses/Exempt\\_organizations/Filing\\_Requirements\\_Form\\_199-N](https://www.ftb.ca.gov/businesses/Exempt_organizations/Filing_Requirements_Form_199-N)

## ***THE SOUNDPOST* Manual**

*The Soundpost* is the public persona and a crucial measure of the pulse of CalASTA - **it defines CalASTA!** The job of putting together this publication is a huge responsibility requiring multiple skill sets including timing, punctuality, judgment, people skills and diplomacy, multi-tasking, and, at times, the ability to “nag”. There are two distinct components:

- The timely production and distribution of two issues per year – one in the fall, one in the winter
- Maintaining, soliciting and servicing the advertisements carried in the publication – identified as **Vendor Advertisers**. The vendor advertisers support financially the totality of the publication.

In 2014 CalASTA put together a four-person Soundpost team: Editor, two Assistant Editors and an elected officer as liaison to the CalASTA Executive Board and advisor to The Soundpost team. Each member of the team has designated tasks (outlined below) all of which bring together the success of *The Soundpost*.

The **contents** each issue of The Soundpost should include but not limited to:

- The President’s Message and presidential succession list
- Minutes from the previous meeting
- A Treasurer’s report (most often a fiscal report but it could be a simple statement of the fiscal health of our organization)
- One-page reports from each of our six sections: Fresno, Los Angeles, Sacramento, San Diego, San Francisco and Stockton
- ASTACAP reports - one each from the north and south coordinators
- String Project reports: University of Redlands, Point Loma and Sacramento State
- Special reports, member-at-large reports, retrospective articles and/or pedagogical material

The Soundpost Team wants to include as many photos of youthful string players and member teachers as possible. The goal is for reports balanced in scope, length and content and to exercise the judgment to eliminate promotional materials and overt publicity in textual contents.

Individual Responsibilities  
Consistent Communication at all levels is the key!

**Current CalASTA President:** Should approve the “final” Draft.

**Current Elected Liaison:** Should be consulted throughout the process and assist, if necessary, in procuring reports, working with advertisers, providing judgment of appropriate copy and, facilitating communication.

**The Soundpost Editor** – Lawrence Huang - [matrixbach77@gmail.com](mailto:matrixbach77@gmail.com)

**The Newsletter**

1. Timely communication (email, text and phone) with CalASTA officers, section leaders, members-at-large, String Project Chairs and others regarding copy deadlines, edits, etc. At least three email reminders with guidelines will be sent prior to each issues deadline (see deadlines below)
2. Compile articles and reports for an Assistant Editor to proof read and edit
3. **NOTE: The guideline template is stored in the *soundpost.asta* gmail account google docs folder labeled **Newsletter Guidelines****
4. Review “final” draft with the CalASTA President or designee
5. The approved “final” and mailing list are sent to Mars Printing and Charters Mailing Group (see contact information below) for printing, preparation and posting.
6. **NOTE: The master copy of each issue will be put into the *soundpost.asta* google docs labeled by each issue in the folder **Newsletters****

**The Vendor Advertisers**

1. Communicate with vendor advertisers, as needed. Send yearly invoices to each **Vendor** in July or early August. **NOTE: The list of current advertiser contact information is stored in the *soundpost.asta* gmail account google docs folder labeled **Vendor Advertisers**.**
2. Compile advertisers payments/checks and send to the CalASTA Treasurer
3. Help create and maintain a potential list of vendor advertisers

**Assistant Editor South** – Dr. Jonathan Thomson – [jonathanmthomson@yahoo.com](mailto:jonathanmthomson@yahoo.com)

1. Assistant Editor South will receive a *Soundpost* word file to proof read and edit the articles and reports. Once that is complete the file will be sent to Assistant Editor North for layout and formatting within the Soundpost template.
2. Contact potential vendor advertisers in southern California.
3. Help create articles and encourage others to write articles regarding string pedagogy

**Assistant Editor North** – Yu-Ting Wang – [yuting.cello@gmail.com](mailto:yuting.cello@gmail.com)

1. This Assistant Editor will design, work layout and input articles into the template. Will work with the Soundpost Team regarding any issues regarding articles, graphics, etc.
2. Contact potential vendor advertisers in northern California
3. Help create articles and encourage others to write articles regarding string pedagogy

Deadlines

The goal is to have each issue in the hands of constituents roughly before each semester so as to be able to include registration deadlines, concert dates and other timely information

- The **fall** issue should be posted late July/early August. **The deadline for articles and reports is May 1**
- The **winter** issue should be posted December/early January. **The deadline for articles and reports is October 1**

Particulars:

- Each issue “master copy” of The Soundpost will be put into the soundpost.asta google docs folder labeled **Newsletters**
- The Newsletter is done using Microsoft program called **In-Design**. The ASTA logo can be obtained from the ASTA Office: 703-279-2113; [asta@astaweb.com](mailto:asta@astaweb.com)
- The mailing list is obtained from the ASTA office: 703-279-2113: [asta@astaweb.com](mailto:asta@astaweb.com)
- **The printing is done by:**  
Mars Printing  
17426 Studebaker Rd.  
Cerritos, CA 90703;  
562-924-2535; [mars@marsprinting.com](mailto:mars@marsprinting.com)
- **Mars Printing delivers the copy for folding, stapling and posting to:**  
Charters Mailing Group  
1426 E. 33<sup>rd</sup> St.  
Signal Hill, CA 90755  
562-424-3202; [chartersmailing@gmail.com](mailto:chartersmailing@gmail.com)
- **The entire process from printing to posting takes about two weeks.**

## SOLO COMPETITION

Immediately following the 2014 CalASTA Solo Competition a comprehensive and rigorous review of the event was begun with every member of the CalASTA leadership team invited to participate. This report is the culmination and the achievable collective recommendations of the salient points of that comprehensive review.

CalASTA's biennial Solo Competition is the apex, the signal, and the definitive event of CalASTA. It should be scrutinized, publicized and organized in a manner proportional to the immense importance it holds for our organization. Currently it is held in October of even numbered years, alternating between Northern and Southern California. The "winners" of the event are featured in the following year's state conference, i.e., CASMEC (California All State Music Education Conference).

**HISTORY:** National ASTA first organized a Solo Competition in 1977; after a biennial start, National ASTA went to an annual Solo Competition in 1985. CalASTA followed suit and began an annual statewide Solo Competition in 1983-84. Fast forward to a few years ago; National ASTA returned to a biennial Solo Competition – CalASTA followed suit. In 2015 (Libby Dietrich at National ASTA fact checked the above) National ASTA returned to an annual Solo Competition. CalASTA has yet to find a way to come into line with the national Solo Competition.

To further complicate the already awkward situation, in 2013, National ASTA decided to de-couple the National Solo Competition from state competitions, i.e., no longer requiring youthful musicians wishing to compete at the national level be recommended by their respective state ASTA organizations. This means that CalASTA teachers can now recommend to their students that they bypass their section and the state competitions. That, in practice, meant that participation numbers in the CalASTA Solo Competition and competition at section levels were diminished.

The following are the SPC recommendations:

### **Long Term Goal – An annual CalASTA Solo Competition - Target Date - 2018**

Almost every respondent to the comprehensive review strongly recommended that CalASTA move to an annual competition. The SPC agrees; three obstacles are identified: I. Available funding, II. people power, and III. The need for a permanent committee to review and direct the operation of the CalASTA Annual Solo Competition.

**I-A** At current levels of income and the solo competition award amounts CalASTA cannot support an annual event at this time. One way to approach this opportunity is to consult with our corporate CalASTA members. If even two or three came forward and agreed to support a yearly solo competition winner's prize of \$1000.00 a pathway forward could be seen and developed.



## Rational

Large corporate CalASTA members (Kjos, Yamaha, Alfred etc.) are often looking to fulfill their community/corporate philanthropic requirements. CalASTA can provide a “big stage” for that to happen. Our corporate members ought to be, at a minimum, asked.

**I-B** By re-adjusting the announced prize money and the age categories simultaneously CalASTA can award more prizes with little or no rise in total cost (In recent years few, if any, “seniors” participated). If each Section and CalASTA re-align the age categories more in line with national - ages 16 to 23 years; and any younger categories determined later, then, if the **Fresno Model** were adopted, the brackets and prizes would look like the following:

Age Categories	Adjusted Awards
Senior - 16-23	\$1000.00
Junior - 12-15	\$500.00
Novice - 8-11	\$100.00

**II.** The SPC believes the needed “People Power” is already within our membership. If the appropriate funding were put into place the persons needed to organize and run an annual CalASTA Solo Competition will come forward, if asked.

**III.** A permanent “Select Competition Committee” needs to be put into place. The operation of the CalASTA Solo Competition is intricate, delicate and time consuming. Most importantly, any change requires the input, cooperation and approval of all six sections. The overarching goal of CalASTA is to develop a well funded and well-organized annual CalASTA statewide Solo Competition **not** to disrupt already existing and well-run section solo competitions. Coordinating this project will take a standing committee of dedicated and willing CalASTA members (committee members need not be existing officers although a current Executive Officer should lead the committee). Lastly, an additional goal of the “Select Competition Committee” would be to lobby national ASTA to re-connect, in some way, state solo competitions with the national solo competition.

### SHORT TERM GOALS - 2016 Solo Competition

Four immediate goals were identified and SPC recommends they be implemented for the 2016 Competition:

1. Each youthful participant ought to be honored in some meaningful way - The **Los Angeles Section Model**: Each competitor for each instrument and for each level should receive a Certificate - First, Second, Third, Honorable Mention or Participant. Patterns for the certificates can be borrowed from the Los Angeles Section.

2. The current level of \$950 ought to be raised to \$1000.00, for the Senior Division. It is understood that part of that amount is for expenses nevertheless a total of \$950.00 appears odd. \$1000.00 just seems better, if for no other reason than appearances.

3. The amount of award money ought to be included in all publicity.

4. CalASTA should place publicity in other organizations' newsletters: CODA, Bay Section CMEA, Northern and Southern California Viola Societies, Cello Societies, Suzuki newsletters – north and south, Guitar and Harp societies, etc. The publicity must include the fact that the competitor's teacher must be an ASTA member.

## **MEMBERSHIP**

### **More Activities – More influence – Stronger Profession**

Membership is the life-blood of all organizations. For CalASTA that statement is especially true – with more members come more well-run activities and additional possibilities in each of the sections and at the state level. CalASTA is a somewhat different kind of organization – when CalASTA provides opportunity for members, in many respects, the opportunities accrue to their students. This is how it should be.

When a CalASTA leader attends a Stand-Up-4-Music or a CMEA meeting, that person represents an organization of over 1000 members. Much more influence is accrued if that same person represented 2000 members and, not as much influence if that person represented only 500 members. That is simply how it works.

When CalASTA's membership is growing that indicates more members are available to engage in section activities, more networking with other string teachers, and more students available for solo competitions, chamber music festivals, ASTACAP evaluations. The above, when combined, indicates a stronger, more vibrant string teaching profession.

The SPC recommends six strategies to increase membership – some of which CalASTA is already undertaking but can be underscored with more emphasis:

- Increase the number of College/University Chapters
- Write up a yearly article giving Kudos to the section with the largest percentage growth in membership
- Continue the Booth at the annual state conference – CASMEC
- Provide Sections with a complete array of ASTA information for each of their section events and encourage them to make that material available.
- Keep working with our Membership Chair to inform sections of new and renewing members (so that they can be welcomed) and, when members allow their membership to lapse, those members can be contacted and know we miss them, not dismiss them.
- Stewardship

#### **College and University Sections:**

The care and nurturing of college age string students and their teachers is of vital importance to the growth and ongoing health and stability of CalASTA. CalASTA's attention to the development of programs, services and opportunities for college age students should become a CalASTA priority. It should be recognized that it serves CalASTA's long-term interests as these students are the members, the participants and, in time, the future leaders of our organization.

Starting an ASTA Student Chapter is outlined thoroughly on the national ASTA Web Site – Member Resources - Drop-Down menu – Student Chapters. There we find several pages of information regarding the formation of student chapters: Bylaws; suggested activities; listed rights, benefits and privileges; opportunities, etc. CalASTA currently has an open position in the Bylaws titled Student Chapter Liaison. **SPC recommends filling that position.** The first duty of the new Student Chapter Liaison will be to contact the faculty advisor at the only California university that currently has a Student ASTA Chapter: CSU San Bernardino. Liaise with that Advisor and ascertain what CalASTA can do to support the CSU San Bernardino student chapter. Further, armed with information from the current ASTA Student Chapter advisor and the information found on the ASTA Web Site, the Student Chapter Liaison could then explore the possibilities of creating ASTA Student Chapters at other California Colleges and Universities.

A yearly **Kudos Award** for the section that garnered the most number of new members over a year by percentage. This will help keep membership growth on the agenda for each section. A write-up in *The Soundpost* would be a minimum reward. Perhaps a plaque with the section name, president's name and the year that section won the Membership Kudos Award can be devised and presented at a yearly CalASTA Board meeting. Other possible tangible awards can be devised at a later time.

The **CalASTA Booth** at the annual state conference – CASMEC – is crucial. It keeps CalASTA visible. National ASTA provides a plethora of materials from application forms, information about insurance, ASTA pins, etc. National ASTA provides this material free. Bravo to CalASTA for organizing and manning this booth each year!

**ASTA Material for Section Events:** The material described above – application forms, tri-fold brochures titled “Why Music,” ASTA pins, instrument liability insurance information, etc., all provided to CalASTA free can and should be made available to each section for the section to display at their events. The retort that only ASTA members attend events is really not true – San Francisco opens their “Practicums” to all; Stockton holds events for the entire string teaching community. There are other cases and then there are always parents who attend events. Further, an ASTA member attending an event might just pick up some material to pass on to colleagues who are not ASTA members. To borrow a phrase from a brokerage firm – CalASTA recruits new members, one member at a time.

The **CalASTA Membership Chair** plays an important role in the entire recruitment and CalASTA communication scheme. The Membership Chair is charged with extracting the CalASTA member names from the *Association News - - ASTA Welcomes New and Renewing Members* found in each of four annual issues of the AST journal; gathering from the California Roster (provided by National ASTA) the contact information for each name and passing that information on to the appropriate person in each section. Each section is then encouraged to welcome the new or renewing member(s) and provide them with information about upcoming section events. This sounds more complicated than it is and it is not as time consuming as it appears. Periodically, National ASTA sends names of members who have allowed their membership to lapse. For the Membership Chair, the process is the same; for the section, our hope is that each of these persons are contacted and made to know that we will miss them. There are multiple reasons for a member to let

his/her membership lapse but this is an important process in membership retention.

**Stewardship:** Part of CalASTA's future is the need for membership – WE ARE CalASTA - to take some measure of stewardship. CalASTA is our organization - it nurtures us and our students and celebrates our many personal and collective shining moments! Telling our story to a non-member, taking personal pride in our membership and asking that non-member to join ASTA is a very small but attractive and effective way to participate in that stewardship. CalASTA leadership can be a collective model for that concept by doing exactly that; tell our story to a colleague and ask them to become a member.

## **FUTURE STRATEGIC PLANNING OPPORTUNITIES**

**Fiscal Development:** SPC recommends a strong, vigorous and continuous campaign to raise money in addition to national rebates. Expanding opportunities at the section and state level is important, providing project support for sections is appropriate and, if CalASTA hopes to hold an annual solo competition in the future additional funds will be necessary.

Sources: We have advertising opportunities beyond the current levels both in *The Soundpost* and our [Web Site](#). Our Treasurer, Michael Feeney, has recently recommended seeking additional advertising; a chart with possible advertising opportunities was created last spring (2015) and distributed to leadership. SPC recommends this information be put to use with an action plan.

CalASTA is a 501 (c)(3) organization and thus any contributions, donations, or support in kind is fully tax advantaged. Soliciting for donations is what other organizations do, including national ASTA. SPC recommends developing a contribution program based on projects such as the CalASTA Solo Competition, some creative CalASTA activity at CASMEC (e.g. a chamber music program) or start-up monies for specific section projects.

**Collaborative Opportunities:** It is said that in order to have a friend one must first be a friend. The purpose here is to devise plans for CalASTA leadership as well as membership to officially reach out to communicate and more fully integrate with our sister organizations: CMEA, CODA, Suzuki Associations, MTAC and more particular organizations such as the Northern and Southern California Viola Societies, violin, cello, string bass, harp, and guitar societies. CalASTA certainly does this already by natural and sometimes pragmatic interaction – ASTA booth at CASMEC, SU4M with CMEA, string sessions at CASMEC in collaboration with CODA. It should not be difficult to imagine and then devise other ways in which CalASTA leadership can increase visibility and more fully integrate into the greater string and orchestra teaching communities, increase opportunity for CalASTA members and, assist through collaboration in effectively fulfilling our mission, purpose and values.

**Technology Improvements:** Communication is the key component of a highly successful organization. Contemporary society places strong emphasis on the plethora of communication tools including email, smart phone, video conferencing and the many social media opportunities including Face Book and Linked-In. In today's world maintaining and updating technological capabilities is how organizations are measured – not by some – but by all. CalASTA must stay in the forefront of technological opportunities. Technological goals:

- Promote ease in accessing and sharing CalASTA information among our varied constituents
- Advance and heighten opportunities for social and personal exchange among membership
- Facilitate communication among leadership membership and the general public
- Improve record keeping
- Create and maintain a positive public relations appearance
- Move CalASTA solidly into the 21<sup>st</sup> century so that our organization is consistently on the cutting edge of technological opportunities

**Re-Align or Create New Sections:** There are areas in our state where a significant number of CalASTA members reside that are simply too far away from Section activity to be reasonably served. Locations such as the Central Coast (Thousand Oaks to Paso Robles) and the communities in and around Bakersfield are such areas. CalASTA needs to explore possibilities for either realignment or the creation of a new section(s) designed to provide those ASTA members with the activities they deserve and should reasonably expect.

## POSTSCRIPT

Laid out in this report are initiatives, creative ideas, and plans to open access, create transparency, broaden participation and foster new possibilities for all string players, string players at heart and string players yet to be through the auspices of our CalASTA organization. As you ponder the contents of this document, the 2015 Strategic Planning Committee report, we ask you to remember why you chose to become a member of the CalASTA board. Can you remember the enthusiasm and pride felt when you first became CalASTA Board member? Each of you brought a certain passion, intense commitment and a deep dedication for the stringed instruments you embrace and for all those who share that affection with you – our venerable thread! As CalASTA board members we owe our allegiance to stringed instruments and all the multitudinous strands that make up the thread that binds us together. At this particular time in our history, and in this particular place, we enjoy the distinct honor, the opportunity, the privilege and ultimately the responsibility by virtue of our office to effect and perfect that allegiance through CalASTA.

The SPC hopes that the current board and future boards will, over time, seriously consider and implement many of the ideas, programs and plans contained herein, each within CalASTA Board priorities, to bring together the individual needs, interests and aspirations of our varied constituency to create a stronger, enduring and more beautiful tapestry, the

tapestry that we all seek and so desire.

**PRESENTED BY:**

- Kyle Champion, ASTA Los Angeles past-President, current Interim Secretary
- Gayane Korkmazian, ASTA past-President, past ASTA Fresno President, current Historian and Insurance Representative
- Loretta McNulty, Past CalASTA Member-at-Large and current CalASTA President-elect.
  - Tom Tatton, lead. CalASTA President

**ACRONYMS**

ASTACAP – American String Teachers Association Certificate of Advancement Program

CASMEC – California All State Music Education Conference

CMEA – California Music Education Association

CODA – California Orchestra Directors Association

MTAC- Music Teachers Association of California

SU4M – Stand Up for Music (Music advocacy program developed by CMEA)

**Disclosure: The structure, many contextual elements and even some phrases were borrowed for this report from "American Viola Society Report of the Strategic Planning Committee, May, 2012". The American Viola Society strategic planning team was led by and the report was written by Dr. Thomas Tatton**