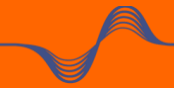


SOULSVILLE FOUNDATION

ONE SOULSVILLE: AN ADAPTIVE BRIDGE
PLAN FOR 2024-2027



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LETTER FROM LEADERSHIP



Dear Supporters, Partners, and Friends of Soulsville,

Welcome to the Soulsville Foundation's Strategic Plan, a roadmap for our future, grounded in the very heart and soul of what makes our campus unique: the power of music.

For over two decades, Soulsville has stood as a beacon of creativity, education, and community, fueled by the transformative energy of our rich musical legacy. From the unforgettable sounds of Stax Records to the artists who called this neighborhood home, music has been a guiding force and a pathway to opportunity. It's music's enduring power that drives everything we do.

This Strategic Plan is not simply a set of goals, but a celebration of our commitment to harness the power of music to transform lives, elevate voices, and create lasting impact.

Stax Music Academy kicks 2025 off celebrating **25 years of world-class music education**. SMA is one of the first youth music programs in the nation to unveil a Work-Based Learning and Certification Program, offering teenagers opportunities to professionalize their musical talents, gain tangible recognition for their skills, and **document their achievements** through **industry-recognized certifications**. Music students can formally validate their technical proficiency and **artistic expertise** by providing credentials that **open doors to employment opportunities**, higher education, and professional networks.

In 2025, The Soulsville Charter School will celebrate its 20th anniversary, kicking off this milestone by expanding The **Office of College and Alumni Support**. We will now include 9th and 10th graders, ensuring students start their **journey to success** earlier. This isn't just about guiding students toward their **post-secondary pathway**, it's about offering **ongoing support after graduation**. By engaging with students until age 25, we're setting our students up for **long-term success**.

Finally, the **narrator of our legacy**, the Stax Museum of American Soul Music, expands its reach in January as the **first museum in Tennessee** to join the more than 600 museums around the world through the Bloomberg Connects app. More than 10,000 students experienced how **Stax Music changed the world** in 2024, and 2025 will surpass that number. Adult education programs offer new public events, and guest curators bringing **fresh perspectives on the Stax legacy**: The Stax Museum is marching toward its next anniversary with **passion and purpose**.

With this strategic plan, we aim to deepen our impact, broaden our reach, and ensure the transformative power of Soul music is experienced from our doorsteps to the world. We invite you to join us on this exciting journey and ensure that the heart of Soul music beats for generations to come.

With gratitude and excitement,
The Soulsville Foundation



PLAN OVERVIEW AND APPROACH




New executive leadership and the imminent celebration of milestone anniversaries within Soulsville Foundation’s three key program areas, including a 25th year anniversary, have provided the optimal opportunity to take stock and craft a strategic framework to drive the operations of the organization and its programs over the next several years.

Unable to fully operationalize the three-year strategic plan developed and approved in 2019, the Soulsville Foundation leadership and board of directors opted to engage P3 Advisors to develop an adaptive bridge strategic plan. This plan leverages the elements of the previous strategic plan, including development of core principles and systems and processes that have become bedrock, and utilized this recent planning period to reinforce the three program pillars and their core activities, as well as the foundation’s long-standing “north star”—to seamlessly operate as “One Soulsville.”

Discovery, including interviews, desk research, and a full-day retreat with the board of directors and key staff, took place in fall 2023. Formal planning began in January 2024 and continued throughout the summer over several phases. During this time, staff and the P3 team translated the strategic vision and impact statements that emerged into strategic imperatives and developed program-level work plans and an implementation agenda that includes key activities, milestones, and timelines for each priority. This plan reflects Soulsville Foundation’s desire to lean into its distinctiveness and ongoing relevance while simultaneously accelerating opportunities for growth and impact.

It is anticipated that the board of directors will approve and adopt the strategy at a fall 2024 meeting, whereupon senior staff and program leadership will continue to refine and confirm the strategic priorities and align on next steps for plan implementation.

This plan reinforces and tactically operationalizes the foundation’s long-standing “north star”—to seamlessly operate as “One Soulsville.”



SOULSVILLE FOUNDATION CORE PRINCIPLES



Mission

The Soulsville Foundation perpetuates the soul of Stax Records by preserving its rich cultural legacy, educating youth to be prepared for life success, and inspiring future artists to achieve their dreams.

Vision

Our vision is to be the global capital of Soul ensuring the legacy of Stax Records impacts all through music, education, and authentic community engagement.

Values

The success of the Soulsville Foundation is derived from an engaged board of directors and an empowered staff. Together, our work is guided by these core values:

Culture of Collaboration

By working together across programmatic silos and in partnership with all stakeholders, we encourage and empower one another to achieve the highest levels of professional and programmatic excellence.

Transparency

We work with fidelity and integrity in all transactions and will share our knowledge, learnings, and best-practice data with organizations in our networks and the broader community.

Commitment to Community


With a focused spirit, we challenge ourselves to develop lasting and engaged relationships with all stakeholders-on campus, in the Soulsville neighborhood, and in the broader community.

Celebrating the Legacy

We harness Stax's rich musical legacy and cultural capital to amplify the stories of our history, allowing the past to drive our ongoing work and inspire stakeholders.

Valuing Youth

Youth are one of our greatest assets and they have led the way since Stax's creation. We value and support their passion, talent, and desire to make meaningful impact on the world around them.



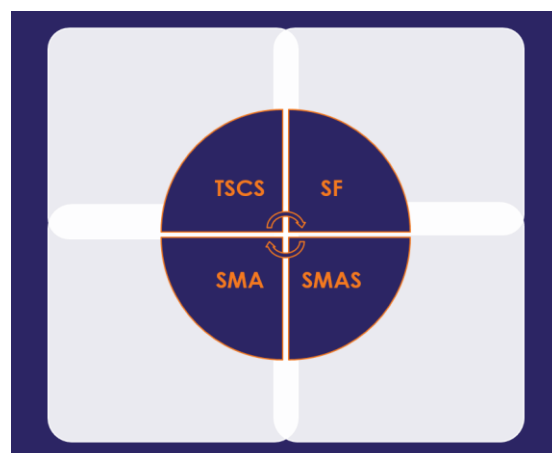
ORGANIZATION OVERVIEW

Stax Music Academy (SMA) is equal parts a first-in-class music education program and platform for one-of-a-kind performance opportunities, buttressed by holistic and tailored youth development strategies. Serving primarily under-resourced youth, the Academy has instructed over 4,000 students in classical soul and blues music. Students also receive robust instruction in music theory, composition, choreography, production, audition prep, and teamwork practices. Academy students have toured all over the world, performing in Europe, Australia, New York City, Los Angeles, and beyond, including on nationally televised programs. The Academy helps alumni pursue post-secondary education and careers in the music industry.

Stax Museum of American Soul Music (SMASM) pays tribute to the artists and musicians who recorded at Stax Records. As one of the country's only "community music museums," it is a unique cultural destination combining captivating artifacts and exhibitions with robust educational programming centered around the history of American soul music. The museum educates visitors about the timeless contributions and accomplishments of artists such as Otis Redding, Isaac Hayes, Booker T. and the MG's, Rufus and Carla Thomas, and so many more. The museum inspires new generations with compelling stories of opportunity, empowerment, and ambition. Contributing to the music and cultural tourism economy of the city of Memphis, the museum hosts over 60,000 visitors annually.

The Soulsville Charter School (TSCS) is a public charter school serving over 650 students in grades 6-12. A high-performing school educating youth from across Memphis, Soulsville is focused on equipping students to flourish in life. That translates into a school culture that fosters success, emphasizes character, and prepares students to confidently choose their own post-secondary path. To date, all students have been accepted into two- or four-year colleges or industry-specific technical training programs. All graduates are eligible to receive ongoing support throughout their post-secondary experience to help ensure their long-term success.

The Soulsville Foundation Central Office (SF) is the support and administration umbrella of the Stax network, managing the budgets and overseeing the assets of the campus and its three program entities. The foundation team and its board of directors oversee the operations of the Stax Music Academy, Stax Museum of American Soul Music, and The Soulsville Charter School, as well as helping to build community in its South Memphis neighborhood.



STRATEGIC IMPERATIVES 2024-2027

The following strategic planning vision and imperatives provide a formal framework for the Soulsville Foundation and its multi-faceted programs. As a means of operationalizing “One Soulsville,” this plan seeks to further unify the organization by aligning its efforts behind four strategic imperatives that are shared across all Soulsville Foundation programs and departments. These imperatives represent common threads that are essential to each program. Under this cohesive framework, “One Soulsville” becomes a transformative ethos through which programs are de-siloed and synergies are built across Soulsville Foundation’s truly distinctive assets in service of mission delivery and organizational sustainability.

Strategic Planning Vision

Leveraging a multi-pronged strategy over the next three to five years, the Soulsville Foundation will drive individual and community impact and empowerment through the ongoing education, aspiration, and celebration of the Stax Records and Soulsville stories.

1) Education: Provide youth and adults with best-in-class learning opportunities

Context Statement:

Education provides a powerful foundational thru-line for all activities on the Soulsville Foundation campus. While the school is an obvious educational anchor for the organization, SMA and the Museum have a roster of core activities focused on broadening the reach and understanding of Stax’s legacy through education. Most stakeholders agree that education is a core activity of the foundation and its multi-faceted approach in this space is impactful and inspiring; education is the area where the Stax legacy most clearly marries to future potential. Opportunities to increase impact and continue to drive excellence exist, including formalizing an arts-integrated curriculum within the school. However, concerns regarding staff attraction, coaching, and retention within the three program areas and administration must be addressed to ensure long-term success.

Summary of Key Objectives:

- Drive excellence in instruction and achievement in all program nodes
- Continue to hire and train staff with clear ability to create and direct education-aligned programming for youth and adults
- Build campus-wide synergies related to programming and instructional scope
- Expand impact in this area through exploration of value-add activities, such as certifications and post-secondary pathways

Implications:

Addition of certification program(s) may present a vital model for education-focused investment and partnership activities on the SF campus well into the future; Researching/benchmarking/implementing best-in-class practices and curricula would have immediate expense impact, but are vital to delivering on the SF mission with continued

excellence; Timing of school-wide assessment of curriculum design may be challenged by the immediate drive to grow student achievement indicators.

2) Aspiration: Honor the Stax Records legacy of ambition by exploring and attaining bold new milestones.

Context Statement:

Perpetuating the soul of Stax is bedrock to the Soulsville Foundation’s mission and an important means by which the Stax legacy is carried forward. All core programs operationalize bold concepts and approaches to harnessing a dynamic future for the organization. A strategic understanding and prioritization of these ambitious efforts to build on SF’s distinctiveness will be required for long-term operational and programmatic success. Additionally, an increased focus on revenue and monetization within key program levers should be built into future planning to guide growth in market share. Leaning further into the organization’s value propositions—creative youth arts engagement built on a legacy of achievement; community-based music museum; best-in-class middle and high school education aligned towards post-secondary success—will allow the organization to deliver on its day-to-day goals while executing on bold new opportunities to build and sustain a powerful national profile.

Summary of Key Objectives:

- Continue growing and implementing music industry certifications
- Formalize and identify funding for internship program(s)
- Grow SMA and School alumni support programs
- Identify key major investor(s) to fuel tuition-free program at SMA for families who meet a specific financial threshold
- Attain national prominence through high-profile awards and designations
- In partnership with Concord, craft strategy for song placement and Stax catalog use in commercial endeavors

Implications:

Area where SF could realize broad success in resource development and recognition with the necessary strategic inputs; Identification of high-target SMA scholarship endowment sponsor(s) would free other resources to be redistributed back to other core activities; Up-front investments to realize success in this area will be required, including efforts to attain national recognition in specific areas.

3) Celebration: Engage communities in honoring and bringing visibility to the full Soulsville story, including its ongoing legacy and impact.

Context Statement:

Communities—both internal and external to the organization—are the key players that animate the Stax and Soulsville stories. As validated throughout the organization’s legacy, convening and communicating across stakeholders builds the broad awareness, interest, engagement,

and commitment that are essential for ongoing success. Framed through the lens of joyous celebration, this area has broad marketing and narrative appeal not only as a way to reinforce the Soulsville story’s ongoing vitality, but also as a way to build on the contemporary “One Soulsville” identity both on and off campus. Strengthening a shared narrative and cultural identity by communing across program levers and stakeholder groups will continue to draw diverse resources into the organization while supporting continued relevance and demand for its work.

Summary of Key Objectives:

- Build on “One Soulsville” brand identity in service of additional support, engagement, and recognition
- Create culture of collaboration and celebration for staff and students on campus
- Leverage moments of national recognition strategically: HBO documentary, *New Yorker* profile, *Ellen* appearance, etc.
- Formalize affinity program(s) for Museum and general SF development efforts

Implications:

Area with greatest opportunity to grow stakeholder base through marketing, cultivation, and engagement efforts that fuel interest in the power of the Soulsville story and its contemporary resonance; While financial resources are required, targeted investments of time and human capital will best determine success; Continued emphasis on value proposition and distinctiveness of model and approach to creative youth development will resonate nationally with targeted comms strategy.

4) Operations: Effectively steward the resources required for a thriving “One Soulsville,” including talent, capital, and the built environment.

Context Statement:

Achievement in other strategic priority areas will only materialize if buttressed by a successful back office operational enterprise. Human capital is key here, as are strategic investments in long-term facilities challenges and other needed infrastructure upgrades. Continuities in executive staff complement as well as board of directors offer valuable expertise and opportunity to clearly and consistently drive mission and vision impact.

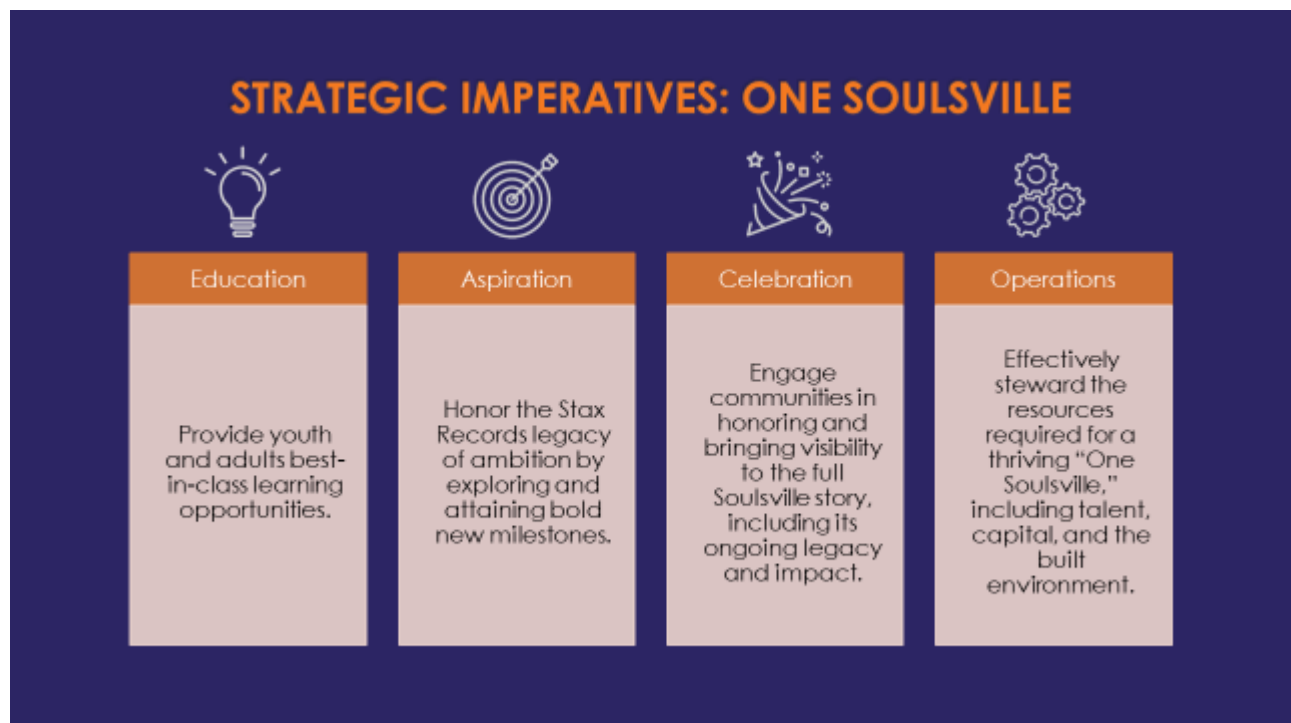
Summary of Key Objectives:

- Addressing ongoing facilities and space needs is critical for operational success across all programs
- Successfully navigating change management will increase personnel stability and satisfaction
- Proactively include deferred maintenance and cap ex projects in annual budgeting
- Assess technology and infrastructure upgrade needs and devise plan for implementation
- Continue to build economies of scale to lower costs and negotiate favorable terms with vendors and partners

- Coordinate fundraising and grant writing functions across network so as to not cannibalize efforts
- Continue to build board capacity in areas of long-range planning, fundraising and stakeholder stewardship and engagement

Implications:

Income-generating opportunities are more passive under this priority, though growing economies of scale offers the best roadmap to increased resource flexibility; Potential for operational crisis is greatest here due to large-scale space needs across most programs—must have clear plan and strategy to ensure fiscal stability; investment in professional development and training for staff will have long-term ROI implications by minimizing talent acquisition and retention costs over time.



ONE SOULSVILLE: EDUCATION



Education: Provide youth and adults with best-in-class learning opportunities.

Context Statement:

Education provides a powerful foundational thru-line for all activities on the Soulsville Foundation campus. While the school is an obvious educational anchor for the organization, SMA and the Museum have a roster of core activities focused on broadening the reach and understanding of Stax's legacy through education. Most stakeholders agree that education is a core activity of the foundation and its multi-faceted approach in this space is impactful and inspiring; education is the area where the Stax legacy most clearly marries to future potential. Opportunities to increase impact and continue to drive excellence exist, including formalizing an arts-integrated curriculum within the school. However, concerns regarding staff attraction, coaching, and retention within the three program areas and administration must be addressed to ensure long-term success.

Goals:

Stax Music Academy (SMA)

- Build SMA student pipeline through ongoing 101 Group Instruction
- Scale and refine songwriting and production programs
- Increase performance collaborations with organizational partners
- Expand students' access to training from and exposure to industry experts
- Formalize services and opportunities for participants to grow proficiencies beyond music instruction program components
- Strengthen campus-wide synergies related to programming and instructional scope

Stax Museum of American Soul Music (SMASM)

- Evaluate and re-design museum operational and program plans
- Build engaging and meaningful experiences for museum patrons


The Soulsville Charter School (TSCS)

- Consistently drive mastery of TN State academic standards for all students
- Provide best-in-class liberal arts-informed education grounded in the Stax legacy of achievement

Soulsville Foundation Central Office (SF)

- Leverage SF's expertise and lessons learned in support of the broader non-profit/education sectors

Overall Outcome: The Soulsville campus is a thriving educational ecosystem that empowers individuals, fosters creativity, and perpetuates the Stax legacy.



ONE SOULSVILLE: ASPIRATION

Aspiration: Honor the Stax Records legacy of ambition by exploring and attaining bold new milestones.

Context Statement:

Perpetuating the soul of Stax is bedrock to the Soulsville Foundation mission and an important means by which the Stax legacy is carried forward. All core programs operationalize bold concepts and approaches to harnessing a dynamic future for the organization. A strategic understanding and prioritization of these ambitious efforts to build on SF's distinctiveness will be required for long-term operational and programmatic success. Additionally, an increased focus on revenue and monetization within key program levers should be built into future planning to guide growth in market share. Leaning further into the organization's value propositions—creative youth arts engagement built on a legacy of achievement; community-based music museum; best-in-class middle and high school education aligned towards post-secondary success—will allow the organization to deliver on its day-to-day goals while executing on bold new opportunities to build and sustain a powerful national profile.

Goals:

Stax Music Academy (SMA)

- Expand program offerings to meet evolving student and market demand
- Further activate alumni support efforts-ongoing mentoring, coaching, and skills development
- Activate student internship and other professional placement opportunities—locally and nationally—in collaboration with existing and emerging partners

Stax Museum of American Soul Music (SMASM)

- Bolster SMASM's community relevance to specific demographic segments

The Soulsville Charter School (TSCS)

- Expand students' post-secondary exposure opportunities in education and/or the workforce
- Amplify learnings and trainings that increase SEL-related competencies

Soulsville Foundation Central Office (SF)

- Ensure the Soulsville campus is a “place of choice” for students and adult populations
- Define brand position and identity of Soulsville Foundation and its key programs
- Maximize the Stax Records catalog and sound
- Assess SF's role in local workforce and economic development activities

Overall Outcome: A Soulsville Foundation that is a dynamic, nationally recognized leader in its field, carrying forward the Stax legacy through innovation and impact.

ONE SOULSVILLE: CELEBRATION



Celebration: Engage communities in honoring and bringing visibility to the full Soulsville story, including its ongoing legacy and impact.

Context Statement:

Communities—both internal and external to the organization—are the key players that animate the Stax and Soulsville stories. As validated throughout the organization’s legacy, convening and communicating across stakeholders builds the broad awareness, interest, engagement, and commitment that are essential for ongoing success. Framed through the lens of joyous celebration, this area has broad marketing and narrative appeal not only as a way to reinforce the Soulsville story’s ongoing vitality, but also a place to build on the contemporary “One Soulsville” identity both on and off campus. Strengthening a shared narrative and cultural identity by communing across program levers and stakeholder groups will continue to draw diverse resources into the organization while supporting continued relevance and demand for its work.

Goals:

Stax Music Academy (SMA)

- Expand community outreach activities

Stax Museum of American Soul Music (SMASM)

- Strategically engage community partnerships
- Reimagine museum-specific affinity programs
- Celebrate Stax/Soulsville milestones and anniversaries
- Cross-promote Soulsville Foundation programs

The Soulsville Charter School (TSCS)

- Incorporate the Stax Records and Soulsville stories (past, present, emerging) into events and gatherings
- Strengthen family engagement in campus and community activities
- Strengthen alumni engagement in campus and community activities

Soulsville Foundation Central Office (SF)

- Raise community awareness and buy-in for the comprehensive Soulsville story (past, present, emerging)
- Build capacity and refine the role of staff and campus personnel in sharing the Stax/Soulsville story with the broader community
- Bolster organizational culture

Overall Outcome: A vibrant, engaged, and interconnected Soulsville community that embodies a sense of shared ownership and pride in the Soulsville story, both past and present.



ONE SOULSVILLE: OPERATIONS

Operations: Effectively steward the resources required for a thriving “One Soulsville,” including talent, capital, and the built environment.

Context Statement:

Achievement in other strategic priority areas will only materialize if buttressed by a successful back office operational enterprise. Human capital is key here, as are strategic investments in long-term facilities challenges and other needed infrastructure upgrades. Continuities in executive staff complement as well as board of directors provide valuable expertise and opportunity to clearly and consistently drive mission and vision impact.

Goals:

Stax Music Academy (SMA)

- Evaluate and manage facilities/ space needs
- Strengthen instructor recruitment and training
- Refine student recruitment and retention efforts

Stax Museum of American Soul Music (SMASM)

- Reconfigure staffing to meet program needs
- Refine collections management plan and approach
- Coordinate and collaborate across programs
- Complete necessary cap ex projects
- Strengthen Stax Museum’s retail operations

The Soulsville Charter School (TSCS)

- Assess facilities and space needs; devise action plan
- Strengthen teacher recruitment and retention
- Expand Student Recruitment Plan

Soulsville Foundation Central Office (SF)

- Strengthen and refine organization-wide systems and processes
- Coordinate budgetary management and procurement activities across programs
- Strengthen development and grants management functions
- Formalize Human Capital Strategy
- Leverage SF and TSCS Boards of Directors

Overall Outcome: A thriving “One Soulsville” ecosystem where all programs operate efficiently and sustainably, maximizing their impact and contributing to the collective success of all Soulsville Foundation programs.

