

WRITING SAMPLE: JENNIE ORVINO

Grants Administration -- **The William and Flora Hewlett Foundation**
2121 Sand Hill Road, Menlo Park, CA 94025

Grant Number: 2007-8817

Grant Period Ending February 2009

Interim Narrative Report

Interim Financial Report

Santa Rosa Symphony Association

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3-year grant: Santa Rosa Symphony FY07-08; FY08-09, FY09-10

[SRS fiscal year July 1-June 30]

Date: February 9, 2009

A. NARRATIVE REPORT

a. Describe the activities/outputs you conducted during the past year. Please compare these activities to the expected activities/outputs you set forth in your grant proposal.

Artistic Program Activities

Santa Rosa Symphony, under the leadership of Music Director Bruno Ferrandis, will have presented the 21-concert Classical Series consisting of seven triple concert sets, and our 7-concert Discovery Open Rehearsal Family Concert Series on Saturday afternoons by the end of our season in May 2009.

In a bold departure for the SRS, Ferrandis took members of our orchestra outside the North Bay to play cutting-edge music at Stanford University through the Lively Arts presenting series. They performed the West Coast premiere of Martin Matalon's composition written to accompany a screening of Fritz Lang's 1927 silent film masterpiece, *Metropolis*. Approximately 900 people attended the one-time performance; it was financially successful for both SRS and Stanford.

In collaboration with Sonoma County Bach Choir, the SRS presented a choral outreach program titled **A Baroque Christmas** in three Sonoma County Churches, December 5, 6 and 7, reaching a geographically-diverse audience from Petaluma to Windsor. The Santa Rosa concert again had its own sponsor in addition to the series sponsor.

The **Symphony Pops** partnership with the Wells Fargo Center for the Arts **expanded in its fourth year** to double performances: Oct. 25 & 26, 2008-*Mancini Magic*; Feb. 7 & 8, 2009-*My Kind of*

Broadway; March 21 & 22, 2009- *A Salute to Motown*. The Pops series will continue with double sets in the 09-10 season.

Other performances included 8 Free Concerts for Youth at the Wells Fargo Center (for teachers and classes from local elementary schools), In-School Performances by Symphony musicians (a total of 34 at 5 schools are scheduled for 08-09 year) and 5 free community outreach concerts that include retirement homes, a school, and Downtown Market. The winter and spring concerts of the 4 youth ensembles, as well as the young musicians' additional performances at Downtown Market, the Symphony of Food and Wine, and more, are also part of our yearly performance schedule.

Music Education and Outreach Activities

SRS continued to train young musicians through its **4 youth ensembles** (Preparatory Orchestra, Discovery Orchestra, Youth Orchestra and Young Peoples Chamber Ensemble), and the **Summer Music Academy**. The Academy, in its 31st annual session, served 131 students ages 5-adult who participated in 11 classes representing 75 hours of musical performance and 6 hours of music appreciation and theory over the course of three weeks.

The 4th annual Youth Orchestra **Concerto Competition** honored three winners who will perform with the Youth Orchestra in a concert on March 15, 2009.

The Brummitt-Taylor Listening Program, providing free daily selections of classical music on CD along with program notes and teaching guides to Sonoma County schools K-6 each week for ten months, has 208 classrooms currently participating. **It's Elementary**, an intensive music immersion program that provides curriculum materials and helps teach core subjects through music, expanded from two to four elementary schools for the 08-09 year; the schools are Forestville, Strawberry, Oak Grove and Luther Burbank.

Activities that benefited the Music for Our Schools/Training Young Musicians program during 08-09 were: the Le Jazz gala benefit dinner and auction; the Symphony League's Symphony of Food and Wine Fundraiser; the 4th Annual Golf Tournament (will take place April 27, but has already garnered \$5,000 in sponsorship).

SRS offers financial aid for Summer Music Academy (SMA), the four year-round orchestras' tuitions and for the Youth Orchestra (YO) tour. During the current fiscal year (beginning June 30, 2008) financial aid disbursed amounted to \$28,180 (total for SMA, year-round orchestra tuitions, and YO tour) benefiting 41 students.

In celebration of the 50th anniversary of its founding, the SRS **Youth Orchestra** will embark on a **European Tour** in June 2009. The young musicians, ranging in age 11 to 19, will be attending concerts, taking master classes and performing. Approximately 60 players, along with their chaperones and conductor, Dr. Richard Loheyde, will participate in the tour. The group leaves San Francisco for Prague on June 17, 2009, will be in Prague from June 18-20, in Leipzig on June 21 and 22, and in Berlin on June 23 and 24.

Financial Health Activities

The financial environment has been, and is, more challenging than anyone could have anticipated. The Hewlett Foundation has continued to honor its commitments to the organizations it serves and

the SRS is appreciative of the Foundation's excellent communication with regard to steps it has taken in light of the global economic crisis.

SRS has been carefully tracking our revenue and expenses for FY08-09, and is projecting a deficit of \$150,000. We are confident that the deficit can be managed through cost-cutting of \$47,303, generation of new revenues of \$38,400, and utilization of cash reserves (designated by the Board of Directors for such purposes) to cover the remainder of \$64,287. At the January 2009 Board meeting, a detailed deficit reduction plan was approved.

In addition, permanent cost savings were put in place by reduction of staff benefits.

In January 2009, SRS Executive Director Alan Silow met with the Community Foundation Sonoma County (CFSC) and proposed a matching grant through the Foundation for local arts organizations. The Foundation responded favorably to Silow's initiative and offered a match to five arts organizations. For the Symphony, CFSC will grant \$1 for every \$2 raised during the matching period, up to a maximum of \$15,000 for \$30,000 in donations. Personal contacts and targeted marketing plans are being used to secure this matching grant.

In addition, the SRS Development Committee is engaging in intensive solicitation of and by the Board for new individual donor prospects.

Besides these exceptional financial activities, SRS yearly marketing efforts continue through season brochure, newspaper advertising, direct mail, website and telemarketing. The area that has expanded most from the previous performance season is our **electronic marketing**. A monthly eNewsletter, titled *Symphony eNotes*, has replaced our print newsletter, and regular monthly eBlasts with special offers have continued. Web sales for the 07-08 season totaled \$70,000. Web sales to date (with three concerts sets to go) are \$25,000. See the financial documents for details of all earned revenue.

On September 21, 2008, we held our annual Gala Concert and Dinner/Benefit Auction. Titled "Le Jazz Hot and Le Jazz Club," these events together netted over \$113,000.

b. Describe the progress you have made toward achieving the intermediate and ultimate outcomes you set forth in your proposal. Has your work resulted in any additional outcomes?

Progress toward OUTCOME ONE:

Raise the Santa Rosa Symphony's artistic and programmatic excellence and leadership in a challenging financial environment.

The Santa Rosa Symphony, conducted by Bruno Ferrandis, performed at Stanford University through Stanford Lively Arts (described in 1A above). Although not a multi-venue tour as implied in our proposal, this concert/screening occurred in December 2008, ahead of the target of 2010. The *Metropolis* film and music performance began to establish the SRS reputation in the greater Bay Area for innovative contemporary music. SRS also received support from the French-American Fund for Contemporary Music for the *Metropolis* project.

The Santa Rosa Symphony continued its Kendall-Jackson Symphony Pops series, naming Michael Berkowitz Principal Pops Conductor for the 08-09 and 09-10 seasons and expanding to 6 concerts.

Progress toward OUTCOME TWO:

Further build the Symphony's music education and community outreach programs to foster a love of music and a lifetime involvement in the musical arts.

The It's Elementary music immersion program expanded from two to four Sonoma County schools in the 08-09 academic year. The schools and their enrollments are as follows:

Forestville – 267, Strawberry – 422, Oak Grove – 315, Luther Burbank – 354 (Total 1,358).

Sonoma County continues as one of the five geographic sites for *Keeping Score* teacher training through San Francisco Symphony. SRS Director of Education, Margie Harrison-Smith continues as one of the two local site coordinators. *Keeping Score* complements the Symphony's It's Elementary program, and Harrison-Smith's role provides a natural bridge for effective communication and collaboration to maximize each program's impact on our schools.

Santa Rosa Symphony hired Janet Greene, one of the Keeping Score faculty members, as this year's curriculum consultant. Ms. Greene completed the 2nd grade math through music curriculum, the language arts lesson plans using Stravinsky's *The Firebird*, and the dance and visual arts curriculum, all conforming to the California state standards. This builds upon last year's Visual and Performing Arts, Science and Language Arts curriculum already completed.

In the area of outreach, SRS issued more than 1,000 "Community Musician Cards" which allow any student in any music program in any school to attend our Saturday afternoon open rehearsal Discovery Concerts. Also 1,200 cards were issued to students at the It's Elementary schools, whether they are studying music or not. The Community Musician Card is good for 1 adult and 1 child free admission. The issuance of these cards resulted in an upsurge of student attendance at Discovery Concerts from about a dozen to close to 100 at each concert.

In the area of recruitment, YO conductor Dr. Richard Loheyde and SRS Education Department staff have increased the number of school visits, for example to those, like Windsor Middle School, with fledgling music or band programs. Dr. Loheyde speaks, guest conducts or coaches music students; the staff members speak and bring small ensembles to perform, providing role models.

We believe that the above activities, as well as our Music in the Schools programs, our Free Concerts for Youth (produced at the Wells Fargo Center and reaching approximately 10,000 students per year) "impact public schools in an integrated, effective and meaningful way" as stated in our Intermediate Outcomes.

Progress toward OUTCOME THREE:

Maintain the financial health of the Symphony and increase the endowment.

The SRS has taken steps for budget deficit reduction as discussed in Financial Activities section. While the SRS endowment is down 17.6% through 12-31-08, it is still below our stock market benchmark of -18.08%.

SRS initiated a 1-for-2 matching grant with Community Foundation Sonoma County, for donations received in a designated period during February-April 2009.

The Development Committee is involved in intensive solicitation of and by Board members for new individual donor prospects. The January 2009 board meeting included a special presentation by a consultant from the Non-Profit Assistantance Group speaking on “How to Be a Good Ambassador for the Symphony.”

In excess of \$600,000 was received in an estate bequest for the endowment in 2008.

c. Describe any major changes that have occurred during the past year within your organization or outside of your organization. How have you responded to these changes?

The most obvious change outside our organization, indeed globally, has been the severe economic crisis. SRS has responded to this change, detailed in the previous sections, through cost cutting, generation of new revenues from many sources, and utilization of cash reserves.

A significant internal change that has occurred in the past year is a revision in the projected opening date of the Green Music Center (GMC) concert hall located on the Sonoma State University campus. This facility will be the new permanent home of the Santa Rosa Symphony. While the GMC Music Education Hall opened in Fall 2008, and the Hospitality Center and Executive Conference Center is scheduled to open in April 2009, the opening date of the concert hall is still undeclared. Construction is 85% complete, and \$18 million still needs to be raised.

The Santa Rosa Symphony entered into a \$500,000 letter of credit with Sonoma State University in December 2004 in order to help begin construction on the concert hall, our major strategic goal. When the SRS received an unrestricted bequest of \$604,000, it allowed the SRS to provide a gift to the GMC to install the variable acoustic components, and to retire the letter of credit. Besides being key to the acoustics in the hall, the timing of the 2008 gift saved \$1,000,000 in construction costs.* The SRS Board of Directors made this decision because of the longstanding partnership with SSU to construct the Green Music Center. Completion of this hall is central to the SRS vision.

d. What lessons have you learned during the past year that will help you in your continued efforts to achieve your intended outcomes? Describe any alterations you have made or plan to make in light of these lessons.

We have learned that putting resources and attention on our electronic marketing has increased the Symphony’s visibility, caused web ticket sales to increase, and provided welcome convenience to our patrons. We are increasing the functionality of our website (our new web-savvy Box Office manager is also our Internet Marketing Manager), have launched a campaign to get emails from all subscribers and patrons, and added *eNotes* newsletter to our monthly email messaging.

We have learned that utilizing our music director/conductor in visits to major donors can generate large gifts for operations and artistic programs. We plan to continue to utilize Maestro Ferrandis as much as possible in Development meetings with major donors.

B. FINANCIAL REPORT

Hewlett Foundation grant funds of \$65,000 were used for 08-09 general operating purposes.

SRS fiscal year ends 6-30-09. **Summary Statement of Revenue and Expenses as of 12-31-08** and updated **Evaulation Chart** will be mailed to the Foundation, Attn: Performing Arts.

*Please see the submitted “Budget vs. Actuals” document