

Oregon Bach Festival: The Next Decade

Strategy Report 2015

Dr John Evans, President & General Director (2007-2014)

STRICTLY CONFIDENTIAL

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Introduction

This strategy paper on the future of the Oregon Bach Festival (OBF) was commissioned by Frances Bronet, Acting Senior Vice President and Provost of the University of Oregon (UO), on 6 October 2014, and has been researched and compiled over a period of three months. It is intended as a dossier to 'inform, educate, and [hopefully] entertain' (to paraphrase the mission statement of my former employer, the British Broadcasting Corporation), addressing the needs of the senior leadership of the UO, but conceived primarily as a reference point for my successor at the OBF, in his/her strategic discussions on the future of the OBF with Barbara Altmann, Senior Vice Provost for Academic Affairs, to whom the OBF now reports.

For this reason, the strategic report has both an important historical component, and the appendices include vital, sometimes lengthy materials. I felt that this would be necessary, as the search process for a new Executive Director has yet to begin, so it will be highly unlikely that the successful candidate will be in post prior to the 2015 Festival, let alone be available for discussions or any sort of formal handover prior to my departure in early April.

I am well aware of just how much of a disadvantage that can be, because I had no handover whatsoever on taking on this post in July 2007. Thought the search process took five month, plus a further four months for me to extricate myself from employment and property commitments in the UK, my predecessor, Royce Saltzman, was not available to me (for health reasons) when I visited Eugene for the final, formal stage of the search process in January 2007; and when I relocated to Oregon in mid-June 2007, Royce was already focused on his final OBF season, so I could do little but trail him. The day after Royce's final season ended, he left town, and I hit the ground running, and only then discovered some of the many skeletons that began falling out of cupboards and office files. For instance, it was the then Director of Development for the Festival that gave me a copy of the damning Pappas Report on the Festival (see pages 37-53); and only then did I discover the town and gown animosity that had developed as a result of the report, and the reception it had received when leaked to the Register-Guard.

Another issue that has colored my tenure at the UO has been what I call the revolving door that is Johnson Hall. During my seven-and-a-half year tenure at the UO, I have worked under the regimes of now fewer than five Presidents or Acting/Interim Presidents, and will have reported to now fewer than seven Senior Vice-Presidents & Provosts/Interim Provosts/Vice-Provosts. Seven line-mangers in seven years! And during that time I received only two annual appraisals, at the tail end of my tenure, while all my staff had received annual appraisals, with agreed targets and goals, every year. Without wishing to labor the point, if you are bringing in a senior arts industry professional to run a performing arts organization within a public educational institution, then a fully professional handover and induction, and appropriate consistency in the line management of that director is the least one might expect.

In the preparation of this report I have consulted widely with senior colleagues and friends in the business, all leaders in their field. These have included executive/artistic festival, orchestral and venue directors on the west and east coast of the United States; festival and orchestral directors in Canada and the UK; broadcasting executives throughout Europe; and orchestral managers in Australia. While they were happy to share their thoughts and perspectives on the challenges facing today's music industry (frankly and sometimes with a passion bordering on despair) they would only do so if their identities remained confidential. For this reason, and this reason alone, they are not credited or quoted directly.

Dr John Evans
6 March 2015

Executive Summary

Key Recommendations

- UO Leadership and OBF's new chief executive should reach a clear agreement on the artistic and strategic vision of the OBF for the next decade that builds on its USP of the music and legacy of J.S. Bach, and a sustained commitment to education and the choral-orchestral repertoire.

- UO Leadership should take account of the implications inherent in having shared and equal leadership of the OBF, when the artistic director is an independent contractor, without any fiduciary responsibility, and resident in Eugene for no more than three to five weeks each year.

- UO Leadership and HR should support the OBF's next chief executive in improving the internal dynamics of the OBF Office.

- The time is long overdue for a repositioning of the 'The Board of the Friends of the Oregon Bach Festival', as OBF's 'Leadership Council', along the lines of the JSMA.

- A strategic discussion needs to be had between the new chief executive and UO Leadership, about the future of the Portland strategy and statewide touring policy.

- The OBF should continue to develop a strong and adventurously popular dimension to the festival program, as in recent years, in an attempt change old perceptions within the community about the exclusive, esoteric nature of the OBF, and attract a broader demographic to bolster our core audience.

- April Libman, the new Director of Marketing and Communications, must be supported by all the OBF directors in her strategy of developing a more contemporary marketing and communications message for the OBF, and in growing the social media shop window for the OBF.

- Given the industry-wide challenges in the performing arts, and the decline in funding and ticket revenue that every arts group is facing, the new chief executive and his/her team must be mindful of talent inflation, and aim to achieve an appropriate balance between large-scale 19th, 20th and 21st century scores, and the core baroque repertoire that has been at the heart of the festival for more than four decades.

- The festival urgently needs to stem the ebbing tide of funding from the corporate sector, public and private foundations, and individual donors, and look to its patrons lower down the pipeline, including second generations of original supporters from the Festival's inception in the 1970s, to become the Conductor's Society members and Gold Ticket purchasers of the future.

- Change is now inevitable, a fact of life, and if you don't take control of it, it will take control of you. For this reason, my successor will not have an easier time of it than I had, so appoint a grown-up, and preferably one with sophisticated management skills and broad experience in the real world!

Leadership Transition and the Search for Identity

Arts organizations that were founded and/or run by the same charismatic individuals for a generation or more are prone to turbulent transitions. One need only reflect on the challenge that faced the Aldeburgh Festival in the UK (after the deaths of Benjamin Britten and Peter Pears), or the Salzburg Festival (on the death of Herbert von Karajan), when these two renowned international festivals struggled to find a new identity. The solutions adopted by these institutions were quite different, but both misfired, for reasons I will now explain.

Herbert von Karajan was the very definition of a Maestro, and throughout the world his name was inseparably connected with the city of Salzburg, where he himself was born in 1908. It would be no exaggeration to say that he dominated cultural life in Mozart's birthplace for four decades. He made his opera debut with the Festival in 1948, became its artistic director in 1956, subsequently founding the Salzburg Easter Festival in 1967 and the Salzburg Whitsun Festival in 1973, and on his death in 1989 a leading obituary referred to him as 'the last absolute ruler'.

Karajan's successor at Salzburg in 1990 was La Monnaie's general director, Gerard Mortier, who is widely credited for modernizing the Festival and lightening its weight of tradition during the decade of his tenure. This was no walk in the park, and it proved to be an eventful ten years! Empowered to move Salzburg out of Karajan's titanic shadow, Mortier faced the implacable opposition of many traditional ticket buyers, the Salzburg gentry, much of the management, and the Viennese press. It was a period of noisy confrontations and adroit backstage maneuvers, yet he achieved much during tenure because he had a clear vision and an absolute determination. Since Mortier's departure in 2001, Salzburg has had a succession of four new directors in 14 years; the Easter Festival was hit by scandal in 2010, involving fraud and embezzlement resulting in $5 million losses over an eight-year period; and in 2013 the Berlin Philharmonic ended a 45-year association with the Salzburg Easter Festival, to set up camp at the Festspielhaus Baden-Baden.

It would seem that titans, and even absolute rulers, have their place in the grand scheme of things! We mere mortals are more likely to be the victims of the ambitions of lesser mortals.

By comparison with Salzburg, Aldeburgh's turbulent transition was scandal free, and much less public, but it is of considerable interest here, because the circumstances and the lessons to be learnt are even more relevant to the OBF.

The British composer, Benjamin Britten, and his lifelong partner and principle interpreter, the tenor Peter Pears, founded that Aldeburgh Festival in 1948. Britten died in December 1976, and Pears a decade later, a decade during which he continued in his role as founding artistic director, but a decade that brought with it a rapid decline in his health. The solutions to this long-drawn-out transition were just as problematical in their own way as those at Salzburg. The one key similarly is that both institutions were dominated for decades, during the immediate post-war period of the last century, by the charismatic genius of an extraordinary individual, Karajan in Salzburg and Britten in Aldeburgh. By the end of their illustrious careers, Britten and Pears were high-ranking establishment figures, Britten, receiving a life-peerage and the title 'Baron Britten in the County of Suffolk' (the first British musician to become a Lord), and Pears (already a CBE) was knighted in 1978.

Though one would not immediately characterize Britten as an absolute ruler (and unlike Karajan, Britten shared the directorship of the Festival with Pears and a handful of like-minded musicians over the years), like Karajan he was the consummate professional in everything he did, and he invariably got his own way on most things that really mattered to him. When he died in 1976, he left an enormous void, because Britten was not only the most internationally respected British composer of his generation, but a consummate pianist and conductor, and a prolific recording artist for Decca (London) Records. He attracted to Aldeburgh some of the finest international composers and performing artists, including Aaron Copland, Zoltan Kodaly, Dmitri Shostakovich, Witold Lutosławski, Hans Werner Henze, Mstistlav Rostropovich, Galina Vishnevskaya, Yehudi Menuhin, Sviatoslav Richter, Clifford Curzon, Murray Perahia, Elisabeth Schwarzkopf, Elisabeth Söderström, Janet Baker, and Dietrich Fisher-Dieskau, often collaborating with them in recital, in concert, and on disc.

Britten was a powerful magnet for the finest musicians, who considered it a privilege to be part of the Aldeburgh set. The first error in judgment following Britten's death, was the desperate attempt by the Festival management to shore up the artistic directorship of the Festival (perhaps with the good intention of providing better support for Pears in his declining years) and the names of the great and the good in the wider Britten circle were being thrown at the wall like spaghetti, in the hope that something or someone might stick and provide the solution management were seeking. When Britten died, the artistic director roster already included (in addition to Pears), Philip Ledger (director of music at King's College Cambridge), and the two artistic director of Britten's English Opera Group, conductor Steuart Bedford and opera director Colin Graham. Within two years these four directors were joined by cellist Mstislav Rostropovich, pianist Murray Perahia, baritone John Shirley-Quirk, and conductor Simon Rattle. To say that this was a dysfunctional family would be putting it lightly. There was also a rapid turnover of two general managers (the first of whom was responsible for this arranged marriage of eight incompatible musicians), which then left the door open to a third manager who took the festival off in a very different direction, underplaying the Festival long-established *raison d'être* of being the home for great performances of Britten's music. If you have a USP in a financially challenged and fragile arts market, it would not be a good time to underplay or disregard it, and for a time even the Britten-Pears Foundation was reluctant to make to great an investment in the Festival, and focused its philanthropy on the educational activities of the Britten-Pears School, a post-graduate academy modelled on the Tanglewood Festival in the US, the summer home of the Boston Symphony Orchestra.

Which brings us to the OBF, and the challenges it will undoubtedly face over the coming decade.

First one must consider the checkered history of succession played out over the last two decades at the OBF.

Founded in 1970 as a program of the UO School of Music & Dance, the Summer Festival of Music (as it was known for the first decade of its existence) was the brainchild of two musicians of extraordinary vision, Royce Saltzman (then Associate Dean of the School of Music) and the German organist and budding conductor, Helmuth Rilling, from Stuttgart, Germany. The Festival expanded its remit during the 1970s, when funding for the arts led to a boom here in the United States, and by the early 80s the OBF was known as one of the foremost choral-orchestral festivals in the US, and its artistic focus (like that of its founder artistic director) became the celebration of the music and legacy of Johann Sebastian Bach. As the Festival moved its core activities into the newly established Hult Center for the Performing Arts in 1983, Rilling's international reputation was such that he was on the guest conductor rosters of every leading European and American symphony orchestra, and the caliber of artist that he was able to attract to Eugene each summer, reflected his standing as one of the foremost Bach scholars and interpreters in the

world. And with the much larger and more sophisticated facilities at the Hult Center at the OBF's disposal, so the ambitions of its programming expanded well beyond the imaginings of its founders. In his own way, Rilling represented as potent a magnet for great musicians as Karajan and Britten had at Salzburg and Aldeburgh, though on a more modest scale, given the resources available to the OBF in those days. Nonetheless, leading international artists including soprano Arlene Auger, mezzo Frederica von Stade, tenor Ben Heppner, baritone Thomas Quasthoff, and pianists Robert Levin and Jeffrey Kahane, became part of the OBF family for a time, and many significant young European artists made their US debuts at the OBF, including Quasthoff (then soon to become an international super-star) in 1995.

After the 1994 Festival Saltzman retired from the OBF and the UO, assuming the title of Executive Director Emeritus. His successor, Neill Archer Roan, was recruited from the staff of the Hult Center, and lasted less than three years in the job, leaving the Festival in financial disarray that took more than a decade to reverse. To save his baby, Saltzman came out of retirement, and he and Rilling closed ranks for the next decade to protect their legacy.

The plan had originally been for Saltzman to retire first, and when a new executive director had found his feet, then Rilling too would retire. Only recently has it come to light that shortly after Saltzman's retirement, Rilling had approached one of his protégés, the Dutch conductor, organist and harpsichordist, Ton Koopman, suggesting that he consider taking on the OBF's artistic directorship. Koopman was at that time Portland Baroque Orchestra's guest director and artistic adviser (from 1986 till 1995) and was already famous as a baroque and period-performance specialist, having studies with the period-performance pioneer Gustav Leonhardt, and having founded his world renowned Amsterdam Baroque Orchestra in 1979.

So in the mid-1990s it was the plan of the founder directors of the OBF to retire, and over a period of three or four years to see a new executive director and artistic director in place by the Millennium. Saltzman was 65 on his retirement in 1994; and Rilling would celebrate his 65th birthday in 1998. And it's extraordinary to reflect that Rilling (never an enthusiastic proponent of historically informed performance practice on period instruments) was prepared to hand over his OBF legacy to Koopman in the mid-1990s, a musician that was at the vanguard of the movement in Europe.

However, to paraphrase Robert Burns, 'the best-laid plans of mice and men often go awry!', and indeed they did. Had the founders' strategy gone to plan then both would have served term of between 25 and 30 years; a new generation of directors would have been in place by the turn of century; and the Festival would have embraced the period-performance practice that was by then mature and pervasive throughout Europe and beyond. But the first step in that strategy had been wrong-footed, and because of a misguided local appointment (and not an altogether popular one, that, incidentally, divided the Board of the Friends of the Festival at the time), the process of succession was delayed for yet another decade. As a result, the Festival lost its momentum and a good deal of its international kudos, as it began to be perceived as being out of step with modern scholarship and performance practice. Meanwhile the programming (with some notable exceptions, including the Grammy Award-winning world premiere of the Penderecki *Credo* in 2003) began (in the words of the Pappas Consulting Group strategic assessment, see pages 47-57) to demonstrate 'staleness' resulting in what many patrons described as the 'repetitive nature of the Festivals.' Even more damningly, the Pappas report concluded that 'the marketing efforts of the Festival are inadequate, and the material is staid and does not appeal to younger generations of music aficionados.'

And so the Festival plateaued, and by the time the Pappas Consulting Group delivered it report in April 2006, the damage was done, the OBF had seriously lost ground, and it had an accumulated deficit on close to $1 million. As a result of the report, Royce Saltzman signaled his decision to retire for a second time, and the UO launched an international search for his successor.

When I was appointed a year later, I submitted an aggressive and ambitious program of change that would not only recover the Festival's position and status after this ten-year hiatus, but also maintain an impetus of renewal in the context of a fast-changing arts scene. The end-game was to signal a rebirth of the institution in time for the 40th-anniversary in 2010, to pave the way for Helmuth to be celebrated as he should when he reached his 80th birthday in 2013, and have a worthy successor in the wings to take over the Maestro's mantle in 2014.

In essence this entailed:

- Restoring fiscal solvency and strong internal management, after a period that saw the Festival run-up an accumulated deficit within the UO in excess of $800,000, that was fast rising to $1M on my arrival

- Introducing annual appraisals for all staff (not a practice at the OBF before my arrival) that addressed skill-set and performance issues, to improve the professionalism of the team

- Restructuring the admin team, to rationalize the work portfolios of individual staffers, to better reflect their skill sets, to create efficiencies, and make the workforce more effective, launching, as necessary, a recruitment campaign to improve the professionalism of the staff base

- Rebranding the Festival in a more contemporary way, and making better use of electronic media

- Revitalizing the artistic program, diversifying the range of music and performance, and create more star appeal each season

- Extending the geographical reach of the Festival beyond Eugene, and significantly in Portland

- Leading fundraising activities in support of the Saltzman Sustaining Endowment Campaign, the Rilling Endowment, and the Berwick Academy Endowment

- Leading the search for the next artistic director, and managing the succession process and transition of directors through Rilling's 80th birthday year and retirement

- Secure the two founders as active supporters of the new regime, as Emeritus Directors

With the following results:

- All seven OBF seasons from 2008 to 2014 inc. closed in the black, while increasing the artistic budget by 50%, and breaking all box office records in the Festival's 45-year history, three times during a period of recession. (See Appendix H: OBF Wrap Press Releases, pages 63-78)

- All OBF staff received annual appraisals during my tenure, none were disputed by the staff members, and all goals were agreed by all parties to be achievable

- The administrative structure was reviewed together with the staff, and new portfolios were agreed and undertaken by staff. During the seven-year period of my tenure there was an 80% turnover of staff to strengthen the professional skill-base of the OBF, which was largely (though not entirely) positive.

- Some weaknesses still exist, with some old and new staff, and will have to be addressed by my successor. Notably, both the Artistic Administrator and the Business Accountant are tainted by experience, with little professional arts administration training, and an inclination to fall back on past experience and outdated solutions to fast-changing challenges

- The Festival was rebranded in 2008, thanks to Tinker Hatfield (head of Nike's 'Innovation Kitchen') and Nike's top graphic designer, Dave Gill, for the 2008 Olympic Trials OBF season, Nike funded this rebranding, valued conservatively to be in the region of $30K

- A subsequent rebranding by Dave Gill paved the way for the change of regime in 2014, on the arrival of OBF's new artistic director.

- Both rebranding exercises made extensive use of new media, notably via the Digital Bach portal on the OBF website that showcased the Festival's educational activities encapsulated in the Conductors' Master Class program, the Discovery Lecture concerts, and the Hinkle Lecture and Seminar series.

- With the full support of Rilling, I was given free rein to program all the chamber music recitals, and the more popular events each season, in order to reach out to a wider demographic

- World stars and diverse musicians and ensembles that found a home in the new OBF schedules included Yo Yo Ma, Midori, Joshua Bell, Frederica von Stade, Thomas Quasthoff, Bobby McFerrin, Tony Award-winner Savion Glover, Cuban all-stars Tiempo Libre, the Pablo Ziegler Jazz Tango Trio, harmonica virtuoso Joe Powers, music education *animateur* Jamie Bernstein (elder daughter of Lennie), and Oregon's world renowned cabaret orchestra, Pink Martini, with Thomas Lauderdale, China Forbes, and Storm Large. (See Appendix H: pages 63-78)

- Over the past seven seasons the OBF has performed not only in its home base of Eugene, but also in Ashland, Astoria, Bend, Corvallis, Florence, Lincoln City, Newport, and notably, each year, in Portland, where it opened a second office at the UO's campus center, The White Stag, in 2011, the year in which the OBF received a Portland Music Award for 'Outstanding Achievement in Classical Music'.

- These past seven years have also seen significant advances in the Festival's fundraising efforts, including the successful conclusion of the $10M Saltzman Endowment Campaign in 2010, the re-launch of the Rilling Endowment in 2013; now more than half way towards its $2M goal; conspicuous success in collaboration with Hal Hinkle and the Hinkle Charitable Foundation in funding the Digital Bach project on the OBF website, and support for the premiere of the reconstruction of Bach's *St. Mark Passion* in 2014; and last but not least, the $7.25M endowment gift from Andrew and Phyllis Berwick for the Berwick Academy, the Festival's new period performance orchestral program for graduate students and young professionals, to be launched during the 2015 Festival. (See Berwick Academy Press Release, pages 79-81.)

- The formal search for Helmuth Rilling's successor began immediately after the OBF's 40th anniversary season in 2010, and the British conductor Matthew Halls was selected by a search committee chaired by the Dean of the School of Music and Dance Brad Foley, with representatives of the OBF Board (past and present), major donors, other community leaders, and representatives of the OBF staff, orchestra and chorus.

- The 2013 season saluted Helmuth in his 80th birthday year (the year during which he also retired from the Bachakademie Stuttgart, where he was also founder/director) and celebrated, in festive style, his extraordinary achievement after 44 years at the helm of the OBF, as its creative force and elder-statesman. The OBF commissioned an *Alleluia* (after Bach) from Scottish composer, James MacMillan, in Rilling's honor, and he received a proclamation from the State of Oregon, Eugene's Arts and Letters Award, Chorus America's Distinguished Service Award, and the University of Oregon's Presidential Medal. Like Saltzman before him, Rilling is now one of the Festival's Emeritus Directors, and will return as guest conductor each year.

So the Oregon Bach Festival enters the important next stage in its history, with a new artistic director at the helm, and very soon, a new executive director too.

The OBF has largely caught up with itself, and with a better qualified staff base, sound finances, seven fiscally and artistically successful seasons under its belt, having already surpassed the half-way point in its $22M campaign goal for the new UO campaign launched in October 2014, and a quasi-endowment reserve of $600,000 in the bank, the future looks rosy. But the performing arts are going through a very tough time at the moment. The future looks just as turbulent, if not more so, and many believe the business models of most arts organizations are broken and unsustainable.

As will be ably demonstrated in the next chapter of this report, the first four months of the 2014 – 2015 season has been little short of disastrous, creating shock waves throughout the industry, across the four corners of the earth.

An Industry in Crisis

The US Recession of 2007-2009 had a devastating impact on the performing arts industry, the effects of which are still felt today. By September 2008 several arts institutions had closed or come close to closing, including the Baltimore Opera; the Santa Clarita Symphony, in California; and Opera Pacific, in Santa Ana, California. And the arts world has been firefighting ever since: the Delaware Symphony Orchestra cut back performance schedules; Seattle Opera projected a shortfall of $1 million for their 2011-12 season; the Chicago Symphony Orchestra had a strike; and the Minnesota Orchestra and the St. Paul Chamber Orchestra locked out their musicians amid labor disputes. Closer to home the Oregon Symphony canceled its return trip to Carnegie Hall in May 2013, to save $300,000. The symphony also cut three staff positions and reduced salaries by 4% for 22 of its 33 staff members. But perhaps, most socking of all, the world-renowned Philadelphia Orchestra, which emerged from bankruptcy in July 2013, reduced its roster from 105 musicians to 95, and cut their pay rates by 15%. This revered institution was the first major U.S. orchestra ever to file for Chapter 11 bankruptcy protection in April 2011.

Meanwhile, the international scene continues this volatile trend even today. Just consider the following calendar of emergencies that accompanied the first four months of the current 2014-15 season.

SEPTEMBER 2, 2014
In its annual report the **Royal Concertgebouw Orchestra** warns the Dutch government that it will lose a world-class asset if it does not increase state subsidy. Despite artistic success at home and abroad, the Concertgebouw ran up an annual deficit of €836,461. 'In two years' time, Holland may no longer have an international orchestra,' warns chief executive Jan Raes.

SEPTEMBER 5
The music director of the **Weiner Staatsoper** quits. In a letter to Vienna State Opera's Artistic Director Dominique Meyer, Franz Welser-Möst resigned his position as General Music Director of the Vienna State Opera, citing irreconcilable differences of opinion regarding the company's artistic planning and profile, which could not be resolved despite several meetings. Welser-Möst withdraws from all 34 of his planned new productions and revival performances in the 2014/2015 season.

SEPTEMBER 6
The contract between the **Atlanta Symphony Orchestra** and the Musicians' Union comes to an abrupt end, as a result of a breakdown in collective bargaining negotiations. Although the musicians remain employees of the ASO, they will not receive a salary until a new contract is ratified, and health care benefits continue only through to the end of September. The orchestra is locked out of its Woodruff Arts Center home.

SEPTEMBER 8
The national broadcaster of Denmark, DR, announced 161 million Danish kroner in budget cuts, the main casualty being the **DR Chamber Orchestra**, an ensemble of high caliber, which will cease to exist in January 2015.

SEPTEMBER 8
Han-na Chang, music director of the **Qatar Philharmonic Orchestra**, resigns with immediate effect, the morning after its BBC Promenade Season debut, and in the middle of a European tour; the second music director in three days to resign with immediate effect. Trouble had been brewing with the orchestra's German manager, Kurt Meister.

SEPTEMBER 13
The BBC releases attendance figures for the **2014 BBC Promenade Season**. Sold capacity at Royal Albert Hall concerts was 88% percent, 6% – 7% down on recent seasons.

SEPTEMBER 15
The **Ulster Orchestra** in Belfast, Northern Ireland, comes under threat. After a volatile period, with chief executives changing every other year, a consultant has recommended reducing the orchestra to just 45 players.

SEPTEMBER 15
Eric Montalbetti, artistic director of the **Orchestre Philharmonique de Radio France**, quits without notice after differences with the new Radio France regime.

SEPTEMBER 16
The Danish Minister for Culture, Marianne Jelved, abdicates all responsibility for DR's plan to axe its **Chamber Orchestra**, when questioned in the Danish Parliament.

SEPTEMBER 21
Riccardo Muti gives up the leadership of the two operas, *Aida* and *The Marriage of Figaro* in the coming season of **Rome's Teatro dell 'Opera**.

SEPTEMBER 22
Alexis Hauser, artistic director of the symphony orchestra at McGill University, fires off an open letter to the Quebec government, urging it to reconsider reported plans to close **Montreal's Conservatoire of Music.** The institution has accumulated debts of $14 million.

SEPTEMBER 24
Nicola Luisotti announces that he will leave the Naples' **San Carlo Opera** after opening night on December 12. He has been music director there for just three years.

SEPTEMBER 24
The Arts in Belgium face 7.5% cuts. The culture minister tells the Belgian Parliament that institutions in the Flemish region must cut back with immediate effect.

SEPTEMBER 27
Daniele Rustioni, 30, one of the bright young talents on the Italian scene, resigns as music director of the **Teatro Petruzelli in Bari**, Italy's fourth largest opera house. He's furious that two productions have been cut from his season. He will leave in January.

SEPTEMBER 30
The temperature rises at Radio France, where **Orchestre Philharmonic de Radio France** music director Myung-whun Chung, Mikko Franck, music director designate, and Daniele Gatti, music director of the **Orchestre National de France**, make known their disapproval of plans to merge the management of the two orchestras, as part of a broader reorganization of the music department by the new director of music, Jean-Pierre Rousseau.

OCTOBER 2
Rome Opera fires its orchestra and chorus, and plans to 'outsource' their function, thus saving €3.4 million by avoiding social and pension costs. 'It's the only way to prevent closure,' says the Sovrintendente, Carlo Fuortes. The media are informed that this is the reason for Muti's recent departure.

OCTOBER 5
Douglas Hertz, chairman of the Woodruff Arts Center that has engineered the lockout of musicians of the **Atlanta Symphony Orchestra**, gives a hardline interview for the Atlanta press. 'I disagree that the public has sided with the musicians. I think the artists' friends have sided with the artists. But I think the corporate community and the philanthropic community understands, like any businessperson would, we're not going to make an investment in a business that keeps losing money.... Again, we're criticized for not wanting a great symphony, right? But we signed [music director] Robert [Spano] to a five-year contract with a raise. And Robert's getting paid. And we signed [principal guest conductor] Donald Runnicles to a three-year contract. He's getting paid. So don't criticize WAC management or the WAC governing board for not wanting to put our money where our mouth is. Maybe Robert's feeling a little bit guilty because he's getting paid and the musicians aren't.'

OCTOBER 6
Musicians at the **Orchestre Philharmonique de Radio France** call a second one-day strike for October 10, to protest plans for a creeping staff merger with the **Orchestre National** and the departure of their artistic director, Eric Montalbetti. Paris is heading for a winter of maestro discontent. Paavo Järvi has already handed in his resignation at the **Orchestre de Paris**. Mikko Franck has said he won't sign concert contracts this season until he has assurances for the future of the Philharmonique and Daniele Gatti is unlikely to last long at the **National**, now he has been chosen as chief conductor at the **Royal Concertgebouw Orchestra** in Amsterdam.

OCTOBER 7
Six resignations in as many weeks, and the crisis will not stop there. Tughan Sokhiev, who recently became music director of the **Bolshoi Opera**, announces that he is to leave the **Deutsches Symphonie-Orchester Berlin,** and has given them 18 months to find a successor.

OCTOBER 8
Meanwhile, closer to home, Jacques Lacombe has made it known that he will not renew his current five-year contract with the **New Jersey Symphony Orchestra** in 2016.

OCTOBER 8
Figaro reports that the **Opéra of Montpellier**, serving the southwest of France, could be shut down in as little as three weeks. The regional council of Languedoc-Roussillon has failed to pay a promised €4 million subsidy. The company is €716,000 in debt, facing creditor demands. The auditor has warned that unless funds are raised within weeks he will have to shut down the company.

OCTOBER 8
Pedro Halffter is reappointed as music director in Sevilla. Despite a fierce campaign against him by the musicians and their union, the well-connected Halffter keeps his job. He will resume as music director of **Real Orquesta de Sevilla** and **Teatro Maestranza** at a salary of €250,000.

OCTOBER 11
The management of **Radio France** scraps plans to merge the administration of its two orchestras after strikes by the musicians. A replacement is to be hired to replace Eric Montalbetti. The head of music at Radio France, Jean-Pierre Rousseau, emerges from the dispute greatly weakened.

OCTOBER 13
Kent Nagano, the incoming general music director of **Hamburg State Opera,** gives a bleak prognosis to *Der Spiegel* on the future of classical music. The audience has grown old, he warns, and is not being replenished. 'In my experience, there are already two generations of people who have never come into contact with classical music; if young people today have no access to classical music, how will they ever know if they like it or not?'

OCTOBER 14
Chicago Symphony Orchestra's operating deficit soars to $1.4 million from $169,000 the year before. Operating expenses shot up from $73.8 million to $78.1 million.

OCTOBER 22
The musicians of the **Memphis Symphony Orchestra**, facing oblivion, agree to take a reported 38% cut in salary for the coming year.

OCTOBER 23
La Monnaie [opera house] in Brussels is ordered to cut its spending by €6.5 million, shedding 4% on staff and 20% on operating costs. The government is putting pressure on the Opera to merge its orchestra with the **ONB National Orchestra of Belgium.**

OCTOBER 29
The *Belfast Telegraph* reports that Northern Ireland ministers must trim £850 million from their departments by the following week. The **Ulster Orchestra**, facing insolvency within a month, is likely to be one of the casualties.

OCTOBER 30
West Australian Opera is losing artistic director Joseph Colaneri and chorus master Joseph Nolan after the current run of *Il Trovatore*. Neither was offered a new contract by the general manager, Carolyn Chard, who said the board was 'reviewing the structure of the company'.

OCTOBER 31
The general director of **Florida Grand Opera**, Susan T. Danis, writes to patrons saying its business plan is no longer viable, there is nothing left to sell, and there is no money for new productions. Unless vast amounts are donated, Florida goes dark. The critical paragraph in her letter reads: 'Since 2006 FGO has sustained only one break-even fiscal year. On average the company has not met its income projections annually, which has resulted in significant deficits. Our sole method for survival to date has been the sale of our assets. After the sale of our administrative offices in Doral is finalized, there will be nothing left to sell.

NOVEMBER 5
Northern Ireland's Arts Minister, Caral Ni Chuilin, a Sinn Fein member, has never attended a symphony concert. Faced with the abolition of the **Ulster Orchestra**, which will run out of cash within a month, she says it's 'not my job' to help out the failing orchestra, echoing her counterpart in Denmark.

NOVEMBER 6
Cause or effect? Atlanta's public radio station **WABE FM** announces that it is dropping daytime classical music for news and speech. Meanwhile the **Atlanta Symphony Orchestra** remains in lockout.

NOVEMBER 8
After a ten-week lock-out, The Woodruff Arts Center, which tried to slash the **Atlanta Symphony Orchestra** to 76 players, makes a major concession on the 7th, allowing the players to vote on a financially tight four-year deal, but one that gives them a guarantee of peace with considerable honor. The new agreement calls for a six percent pay increase for the musicians over four years, and participation by the musicians in a new high-deductible healthcare plan, which will include increased premium contributions by the musicians and additionally provides substantial savings to the ASO.

NOVEMBER 14
Stéphane Dorin, a sociologist and professor at the University of Limoges, publishes the findings of his recent study on the demographics of concert audiences. A survey of 5,000 audience members at 110 performances by 19 orchestras revealed an average age of 61. A comparable survey in 1981 reported the average to be 36. The report concludes that the same people are still going to the same concerts, but there is little or no sign of renewal.

NOVEMBER 17
A turbulent weekend at the Teatro Colon in Buenos Aires, as musicians protest over wages and the physical danger they face in a crumbling orchestra pit. The **Buenos Aires Philharmonic Orchestra** shares its sentiments with their audience before a performance of Mahler's *Das Lied von der Erde*.

NOVEMBER 18, 2014
The Mayor of Rome posts a blog on the peace settlement reached with the orchestra and chorus at **Rome Opera**. The final sentence reads: The mayor underlines that Riccardo Muti will carry on as honorary conductor of the **Teatro dell'Opera di Roma**.

NOVEMBER 22
Kevin Ramach, 54, resigns as president and general director of **Minnesota [Opera]**, less than three years into the job. His predecessor, Allan Naplan, lasted no more than a year. Nina Archabal, former director of the Minnesota Historical Society, takes over as interim director.

NOVEMBER 26
Riccardo Chailly takes over as principal conductor at **La Scala, Milan**, on January 1, 2015 and will become its music director in 2017. In a wide-ranging interview with British arts journalist Norman Lebrecht, Chailly declared 'we want to be ambitious and money has to be found. We can't rely on private funding any longer.'

NOVEMBER 26
On 18 November the Mayor of Rome posted a blog on the peace settlement reached with the orchestra and chorus at **Rome Opera**. The final sentence reads: The mayor underlines that Riccardo Muti will carry on as honorary conductor of the **Teatro dell'Opera di Roma**. The **Opera** returns as staff members endorse a tough deal; everyone agrees to take a pay cut and commits to more productive employment terms.

NOVEMBER 29
The London *Financial Times* reports that George Osborne (Tory Chancellor of the Exchequer and Second Lord of the Treasury) is hinting at tax breaks for British orchestras in his forthcoming autumn statement. The sector complains its public funding from the Arts Council has dropped 14 percent in four years, and musicians' pay has fallen behind inflation.

DECEMBER 1
IMG *Artists* publishes its accounts for the year ended 31 December 2013. Turnover is down from £8.6 million to £7.2m and there's a pre-tax operating loss of £341,914. The company is carrying almost £3 million of debt due within a year and appears to be living off credit from its joint owners, the American Barrett Wissman, and the Russian Alexander Shustorovich.

DECEMBER 3
The Katie Wagner regime at **Bayreuth** is getting into its stride. Having got rid of her half-sister, Eva, and a Parsifal director, she's now cleaning out the backstage. First to go was the respected technical director, Karl-Heinz Matitschka. His Swiss deputy, Andreas von Graffenried, was prepared to step up, but he was told yesterday that his services were no longer required.

DECEMBER 4
Irina Tarasova, **Russian Arts Minister** announces a five-point tick-box that will be distributed to audiences at state-sponsored theatres from next year. She says that those theatres that get low audience ratings would be penalized with loss of subsidy.

DECEMBER 7
First, William Christie and **Les Arts Florissants** were stripped of €333,900 by the city of Caen in September; now Mark Minkowski and the **Musiciens de Louvre** are losing €438,000 from Grenoble.

DECEMBER 10
Hours after the confirmation that Denmark Radio is scrapping its chamber orchestra, Canadians learned that **Orchestra London**, founded in Ontario in 1937, will cease operations this month.

DECEMBER 10
The **Montpellier Opera** is in deep deficit. To keep it alive, up to 30 players in the orchestra have agreed 'voluntarily' to resign with immediate effect, lightening the wage bill and enabling performances to continue.

DECEMBER 10
Milan's **Orchestra Sinfonica di Milano Giuseppe Verdi** issued a statement, accusing the Italian Ministry of Culture of failing to pay a cent of its €3 million subsidy this year. 'The existence of the orchestra is gravely tested by the chronic absence of government funds,' it says.

DECEMBER 12
Resmusica reports the immediate resignation of the highly rated French conductor Ludovic Morlot as music director of **La Monnaie in Brussels**. He will leave at the end of this month. Ludovic Morlot said: 'the orchestra and I are unable to share an artistic vision. In their interest and in mine, I have decided to resign.' Morlot is the third music director to leave La Monnaie in six years. Kazusho Ono quit in June 2008. Mark Wigglesworth lasted just one season.

DECEMBER 16
Peter de Caluwé, head of **La Monnaie**, has announced 15 jobs losses and an end to the dance program – this, at the company that was Maurice Béjart's base. The opera program will also be shortened. De Caluwé says he has no choice. The government is clawing back 15 percent of its subsidy.

DECEMBER 22
The credit rating of the **Metropolitan Opera** was downgraded after a year of conflict and losses. The ratings firm Moody's gave it a negative outlook. That will make it harder for the Met to borrow money on, for instance, payday. The Met operating deficit hit $22 million last July, up from $2.8 million the previous year.

DECEMBER 31
Milan's **La Verdi** Orchestra is saved by the state, albeit two years late! The state had failed to pay €3 million, promised in 2013. A further subsidy of €950,000 is guaranteed for the coming year.

The themes common to all these conflicts are self-evident: reduction in state and/or philanthropic subsidy; broken business models with high fixed costs; talent inflation; dwindling audiences; open conflicts between the priorities of music directors on the one hand, and governing boards and their chief executives on the other.

In essence, these are the potential threats to the future of any performing arts organization, anywhere in the world in this day and age, and should be high on the list of concerns and priorities for the next chief executive of the Oregon Bach Festival.

Today's Performing Arts Environment

The Nation

According to a 2010 national study on *Arts and Economic Prosperity* done by Americans for the Arts, nationally, the average arts attendee spends $24.60 (in addition to the price of admission) when they see an arts and culture attraction or event. These audiences funnel an estimated $74.1 billion of revenue to local merchants and their communities. Non-local tourists spend twice as much ($39.96 versus $17.42) to see an arts event than do local attendees, demonstrating that when an organization attracts cultural tourists, it harnesses significant rewards.

The State

According to the National Endowment for the Arts, adults in Oregon attend more classical music, opera and jazz concerts per capita than in any other state and rank second in per capita attendance to the arts in general. Almost 17% of all Oregon adults attended a classical music concert in the year 2008.

City of Portland

According to a 2010 study by the Oregon Cultural Trust, approximately 3.9 million Portland residents (83.7%) attend the arts, along with 756,363 non-resident attendees (16.3%), an annual total of 4.6 million. Residents spend approximately $17.72 (excluding admission) on event-related spending per outing, and non-residents spend $43.13. Consumer spending on arts and culture in Portland contributes $10.9 million to the state, and $10.3 million to the local government. The City of Portland, with a population of 593,820, is the 29th largest city in the United States. Its residents are primarily white (76.1%), with Hispanic (9.4%), Asian (7.1%) and African American minorities accounting for much of the balance. The city's median household income is $51,238, and its residents' median age is 35.8. The population is closely divided between males (49.5%) and females (50.5%). A high percentage of Portland residents, 43.1%, hold college degrees, with some attaining graduate and/or professional degrees.

City of Eugene

The City of Eugene's 2010 population was 156,185 (rising to 159,190 by April 2013), making it the second most populated area in the State of Oregon, and the 155th largest city in the United States. Eugene's population is 88% white and 5% Hispanic. Median household incomes average $39,150, and 53.9% of the city's population has graduated from a four-year college course, with some completing graduate or professional degrees. With a median age of 34, Eugene's population can be further segmented: 37,900 are aged 20-34; 38,800 are 35-54; 17,100 are aged 55-74; and 9.400 are aged 75 and over. Eugene is comprised of 49% females and 51% males.

As reported by the Oregon Cultural Trust, total spending by non-profit arts and culture audiences in Eugene represents $16.1 million, with spending by arts and culture organizations topping $29.4 million. The industry supports 1,739 jobs, and generates $34.8 million in household income. Its contributions to local government revenue are $1.6 million, with $743,000 in state revenue. Local attendees represent 85% of total attendance to arts events held in Eugene and spend approximately $10.6 million per year (or

$17.18 per event) on attendance-related expenses. Fifteen percent of attendees travel from outside the area, spending approximately $5.4 million per year (or $38.92 per event). There are roughly 796,000 arts attendees living in Eugene and surrounding areas in Lane County, and 141,000 non-resident attendees that travel to Eugene to see an arts and/or cultural event.

The Eugene community also boasts relatively high overall engagement with the arts: it ranks seventh in the nation in volunteer hours donated to the arts, fourth in the number of hours donated to the arts, and second in the number of people attending an arts event who say they are artists themselves.

The National Arts Market

The *2013 National Arts Index*, generated by Americans for the Arts, reported that the national arts industry is lagging behind the economic recovery, with many non-profits arts organizations still ailing financially (44%). In 2013, there were 95,000 non-profit arts organizations in the United States; 800,000 more arts businesses; 2.1 million artists active in the workforce; generating $153 billion in consumer spending. In 2011, it was estimated that 33% of the total U.S. adult population had attended a live performing arts event.

According to the NEA's *Survey of Pubic Arts Participation*, for the first time since 1982, attendance rates have decreased for virtually all arts forms. The survey counted 408 million attendances to arts events, a decrease of 20% from 2002. Additionally, the average number of attendances per patron also declined from 6.1 in 2002, to 5.2 in 2008.

A summary of trends affecting the arts industry since 2008 makes for sober reading:

- According to an analysis undertaken by the League of American Orchestras, the U.S. arts audience, like the population as a whole, has grown older over the past decade, and participation rates have also declined between generational audience segments and within each generation as they age.

- According to the NEA, 50% of American adults have neither attended live events, nor use media to engage with the arts.

- Consumer spending on the arts remains flat at $153 billion however, because total consumer spending has increased over time, the share of spending allocated to the arts has actually slipped from 1.88% in 2002 to 1.43% in 2011.

- Arts and culture is losing its market share of philanthropy. Overall donations to the arts dropped from 4.9% of total philanthropy in 2001 to 4.1% in 2011, while education, health and environmental organizations showed growth.

- From 2002 – 2008, 45-54 year-olds, historically the largest share of arts audiences, showed the steepest declines in attendance. However, they still comprise the highest number of attendees to the arts in general, and are more likely to attend the arts than younger adults or those over sixty-five.

- The *National Arts Index* reported that since 2009, the percentage of college bound seniors with at least four years of arts and music education declined to 17.6% from 2006, when it averaged 20%.

- In 2008, 67% of people with graduate degrees attended at least one arts activity, compared to 38% with some college education and 19% with only a high school diploma. While arts activity is directly associated with the level of education attained, even well-educated groups of Americans were participating in the arts less than in any other year measured.

- 55% of all people that attend at least one live arts performance each year are women, and almost 50% of all attendees of arts events have household incomes of $75,000 or more.

- Arts attendance varies by geographical region: the overall percentage of people attending the arts was highest in New England and the Pacific Regions of the U.S, accounting for 42% of total attendance.

- International tourism for the arts remains strong – those attending concerts and theater performances have increased in five of the last seven years (up 17% since the year 2003).

- How consumers participate in and consume the arts is ever-changing. The digital age affords consumers the tools for personally curated arts events. Many Americans now use the internet to engage in artworks or performances. It's estimated that 4 in 10 U.S. adults who use the internet, do so to download, watch, or listen to music, theater or dance performances

- On average, arts events draw approximately 75% - 80% of their ticket buyers from within a 30-minute drive; 95% drive 50 minutes or less.

- Evidence suggests that for any given arts event, a majority of the audience (up to 40%) did not buy their own ticket (someone else bought it for them) or engage directly in the purchase decision. This implies a strong connection between social context and arts attendance. Types of groups that frequently come together to attend performances include: co-workers, college alumni groups, family groups and friends. Attenders that do not buy their own tickets (referred to as shadow audiences) are difficult to track in databases, and are therefore more difficult to market for repeat purchase.

- Industry-wide, the average number of tickets per order is 2.5

- Types of unsatisfactory event experiences that may hamper attendance may include past problems with programming, poor routine performances, but significantly issues such as parking, HVAC, poor acoustics/ambient noise, ticketing problems, and uncomfortable seating.

- Despite declining overall attendance, and waning consumer spending, arts organizations are still fostering creativity and innovation through new works. Between 2001 and 2011, audiences were treated to more than 9000 premieres: 100 operas, 342 orchestral works, 2531 plays and 5,000 films.

The Classical Music Market

According to the League of American Orchestras' *Audience Demographic Research Review* (2009), and consistent with national arts industry trends, the audience for live classical music in the U.S. is declining. The 2008 NEA *Survey of Arts Participation* noted that only 9.3% (or 20.9 million) of all adults in America had attended a classical music performance in the last year, down by 2.3% since 2002. The total number of people showing a preference for classical music, regardless of attendance at a live event, also decreased significantly: from 27.4% in 2002 to 25.7% in 2008.

A segmentation study done by the Knight Foundation (that included 11,250 consumers in 15 major markets) noted that 12% of potential classical music consumers were completely unaware of their local orchestra, and only 12% could name a classical music composer or composition.

Decreases in audience engagement and participation are seen across all generational segments, as well as within each segment as they age.

With regard to these trends, the live classical music audience is declining against three very specific metrics:

1. Overall participation rates have dropped (from 12.5% to 9.3%)
2. Unique audiences (the number of people who attend performances without regard to frequency) have declined by 13% (representing 3.3 million) between 2002 and 2008
3. Paid attendance has decreased by 8% between 2002 and 2008

Of the 20.9 million U.S. adults who have attended a classical music concert in the last year: 22.3% saw a symphony orchestra, 22.3% attended a classical music concert with a choir or vocal ensemble, 17.1% attended a music recital by a singer or instrumentalist and 12.5% attended a chamber music concert.

Other trends affecting the classical music audience include:

- As is consistent with the overall arts market in general, audiences are aging due both to the disproportional amount of baby boomers, and also the declining participation rates within each generation as they age.

- While some have argued that classical music is not, nor should it be elitist, the uncomfortable fact remains that live orchestral concerts reach only a handful of the population for this, among other reasons.

- Audiences for classical music are typically professional or retired, fifty plus years old, relatively affluent, well-educated and white. More women than men attend classical music performances, although men average slightly more performances per year. Most do not have children living at home. Less than 10% of the audience is under 35 years old.

- According to the Knight Foundation's *Classical Music Segmentation Study* of 15 major symphony markets, a reported 50% of subscribers are 65+ and 17% are 75 or older. Of the "potential classical music" audience questioned, only 8% said they are inclined to subscribe. The lack of subscriber potential is especially true in younger audience segments.

- The 2014 Culture Track *National Study on Attitudes, Motivators and Barriers of Culturally Active Audiences* states that loyalty for classical music continues to decline. Subscription audiences have decreased from 23% in 2011, to 10% in 2014. Memberships have decreased from 26% in 2011 to 15% in 2014.

- Most major orchestras serve only 2%-3% of total adults in their respective markets.

- Nationally 52% of the base of classical music attendees typically plan 10 days or less in advance of the activity; 23% like to plan several weeks in advance; and 26% like to plan more than a week ahead of time. Young audiences are the least likely to plan in advance.

- Consumption of the arts has changed in tandem with advancing technologies. It is now estimated that 18% or 40 million adults (versus 9.3 for live performances) explore classical music through the internet and other digital sources. While unexpected, these people are also two to three times more likely to attend a live performance. For some adults, electronic media represents their sole means of engaging in the arts: these are generally minorities, adults with lower household incomes, less education and/or facing economic or geographic barriers to attendance.

- Classical music CD sales plummeted in the 5-year period between 2008 (13.32 million) and 2012 (7.5 million), while classical music downloads increased significantly during the same period (63.6 million in 2008 vs. 116.7 million in 2012).

- According to the *Classical Music Segmentation Study* done by the Knight Foundation, classical radio broadcasts are still the dominant mode of consumption. A seven-year decline in the number of classical music stations corresponds with declines in listenership, despite that this medium is considered vital to audience development and retention.

- Evidence suggests that the majority of current classical music attendees developed an initial interest in this art form before the age of 14 and, that three quarters of them learned to play an instrument as a child. Even though attendees develop an interest in classical music in their pre-teen years, there is a strong probability that they won't convert to ticket buyers until 20+ years later.

- On average, 74% of orchestra ticket buyers have either played a musical instrument or performed vocal music at some point in their lives.

- In the *Classical Music Segmentation Study* of 2002, it was reported that in terms of the benefits associated with attending a classical music concert, "artistic and educational value" was ranked number one.

- In the *Audience Motivation Research Report* completed in 2001, the most important factors correlating to audience enjoyment of classical music were 'How knowledgeable I am about the music?' and 'How familiar I am with the music?'

- Audiences believe that the three most important features of a classical orchestra concert are:

    1. How well the music is performed
    2. The acoustics of the hall
    3. The actual works being performed

- The overwhelming motivation for attending a concert is the music itself. However, it is the barriers to purchase that more greatly affect attendance. These include:

    1. Difficultly finding time in a busy schedule

2. Making a commitment ahead of time
3. Tickets costs
4. Absence of social context.

These barriers are more than twice as strong for single ticket buyers and audiences younger than 35 years old, than for older audiences and subscribers.

- Roughly one-third of orchestra audiences are more sophisticated than the other two thirds. Both qualitative and quantitative data suggests that the less sophisticated audiences want a more interesting concert experience. They believe that this helps understanding the music and its context, and will make them better listeners and increase their level of enjoyment.

- Nationally, 43% of those that attend classical music concerts said that they have a favorite composer; 24% said that they have a favorite musical composition; and 20% have both.

- Of those that said that they have a favorite composer, Beethoven topped the list, followed by Mozart, Bach, Tchaikovsky and Chopin. Those that named a favorite musical composition chose Symphony No. 5 (Beethoven), Choral Symphony (Beethoven), Moonlight Sonata (Beethoven), Handel's Messiah, Bach's Brandenburg Concertos, Vivaldi's Four Seasons, Tchaikovsky's Nutcracker Suite and Pachelbel's Canon.

- Personal performance of classical music is highly correlated to educational level – more so than other art forms. Adults with college degrees are six times more likely to perform classical music than are high school graduates. In 2008, approximate 3.1% or seven million adults performed classical music.

- A Chorus America study titled, *America's Performing Art: A Study of Choruses, Choral Singers and Their Impact* notes that 285 million Americans (adults and children) are engaged in choral singing. Many of them sing in more than one chorus, and about one-third sing in three or more. There are an estimated 250,000 choruses in this country. In fact, more Americans engage in the public performance of choral singing than in any other art form in America.

- 70% of those who sing in choruses today say they sang in a chorus in elementary school. More than 50% say that they grew up in a home where other family members regularly sang in a chorus. Again, this evidences a strong connection between the roles of education and family in future arts engagement.

- Adults attending ballet or opera are more likely to attend a classical music concert than adults attending other art forms.

- Rates of cross over attendance between classical music and other musical genres are:

    1. Pops concert attendees are most likely also to attend classical music concerts (73%) and least likely to attend chamber music concerts.
    2. Classical orchestra attendees are least likely to attend pop concerts (43%) and most likely to attend classical concerts by choirs and vocal ensembles (61%)
    3. Chamber music concert-goes are very likely to cross over to all other types of classical music, except for pops.

Future Trends

- The Hispanic/Latin American population segment is expected to outpace the growth of any other; this segment is expected to constitute more than 50% of the U.S. adult population over the next 20 years. Projections suggest that among this group, participation in live classical music will increase by 46% - from 2.4 million in 2008 to 3.5 million in 2018. Hispanics are forecasted to increase their share of the total live classical music market from 12% to 20% by 2018, as on the whole they demonstrate a stable to slightly growing affinity for classical music.

- As the number of classical public and commercial radio stations continue to decrease, digital channels will be vital to both reach and educate new and younger audiences.

- Although print and broadcast sources (primarily television, newspaper and radio) are still used most often to learn about live performance events, on-line sources are growing more and more important, especially to those under the age of 44.

- Results from the *Classical Music Segmentation Study* suggest that consumers' definition of classical music is in in the throes of change, and often differs from what is valued by artistic directors, music directors, orchestras, and programmers. Respondents cited classical music as comprising a broad array of genres, including cross-over artists. Part of this change is due to advances in digital recordings and new media, which have accelerated the diversification and fragmentation of musical tastes globally.

- Classical music is becoming less and less competitive with diversionary entertainment opportunities however adults are also evidencing a stronger and stronger need for enrichment activities. In the future, classical music should focus on promoting its strength as an enrichment activity: building awareness of what classical music delivers, and what enjoyment a familiarity of it brings.

- A comprehensive response to long-term audience development must involve a range of community partners including funders and other stakeholders in all corners of the community. Stimulating continuing creative expression through classical music and other art forms is a quality of life issue for most communities. Classical music can't survive without musicians, conductors, composers, donors, civic leaders, teachers, students, radio hosts, listeners, recording industry executives and audiences for live concerts.

The OBF Statistics

Historically the Oregon Bach Festival draws 70% of its audience from the State of Oregon (with approximately 73% coming from Eugene), with 4% coming from the State of California and 2% from Washington State.

Festival goers are predominately female (56% in 2010, 60.7% in 2011 and 65.9% in 2012), aged 55-74, with annual household incomes between $50,000 and $149,000, and either work full-time or retired (49.1% were retired in 2011 and 51.9% in 2012). The four most likely occupations of audience members are (in order of predominance): teaching, managerial/professional, healthcare and technical/scientific.

According to secondary research, most concert attendees share similar and strong lifestyle traits:

- 80% enjoy experiences that stimulate the senses
- 80% seek experiences that challenge them to think and grow
- 75% subscribe to one or more daily newspaper
- Magazine readership tends toward news and culture, rather than home, food and/or fashion
- They attend religious services frequently: 72% attend at least once per month, 57% attend three or more times
- They're heavy travelers, with 10% or more reporting that they've taken 10 or more pleasure trips in the preceding year
- Frequent internet users
- 65% think it's important to break routine and get away for an evening
- Less than 25% describe their lives as pretty much the same from week to week
- Attenders are community oriented: approximately half do volunteer work regularly

Ticket buyers for the Oregon Bach Festival typically behave similarly from year to year. To illustrate their purchasing behavior, the following facts hold true of audiences from 2010 -2012:

- 32% of ticket purchases are typically made on-line, 41% by phone and the 27% at the box office either in advance or on the day of the show
- Average total number of performances attended by a festival goer is 2.4 events
- The majority of ticket buyers (58.3% in 2010, 54.5% in 2011 and 54.1% in 2012) have been attending the Festival for 3+ years, although the second largest individual buying group (after the group that's been attending for 10+ years) is first time attenders (26.9% in 2010, 30.5% in 2011 and 22.9% in 2012)
- Single tickets are purchased 30 days in advance by approximately 50% of attendees, 63% purchase two weeks in advance and 77% have purchased tickets by opening night.
- The average number of performances seen by a Gold Card holder was 22.6
- In 2014, there were 419 Festival Friends who represented $121,240 in ticket income total, or $292 per Friend. This represents over 20% of total ticket revenue for that year.
- The incidence of social media use continues to increase among the Festival's audience members. Usage of Facebook, which is the most popular vehicle among attendees, has increased by 15% each year. In 2012, 80.3% of Festival audiences were frequent Facebook users. You Tube and Twitter round out the top three social media sources used by audience members.

For a complete perspective on these matters, and an exhaustive marketing and communications strategic proposal to address theses and other issues from OBF's Director of Marketing and Communications, April Libman, see Appendix J, pages 72-100.

The Oregon Bach Festival of the Future

In the context of the first three chapters of this report, in terms of the lessons from history, the current turbulence in the arts market worldwide, and the statistical evidence that also reflects the volatile arts environment within which we currently operate, one might ask if there is a future for the Oregon Bach Festival in the 21st century. And, frankly, the answer is by no means certain or positive.

Nothing can or should be assumed: some great institutions have a shelf life and wither or die; others reinvent themselves and embrace change as a given in today's market, albeit reluctantly; very few have the courage and imagination to lead the way, and become something even greater than their past or their present.

For four decades the OBF promoted itself as a world leader, make copious use of sound bites from a handful of international press reviews, from the London, New York and Los Angeles *Times*, and the *Wall Street Journal*; but in truth, these reviews date back to the halcyon days of the 1980s, when the Festival and its founder artistic director were riding high. The first half of the 1990s was characterized by management and succession uncertainty, followed by a decade of financial decline.

By the time the Pappas Management Report was delivered to the University of Oregon in April 2006, things had unraveled badly (see Appendix F, pages 47-57), and the UO had to decide whether to reinvest in the OBF's future, or pull the plug on the enterprise. As I understand it, it was touch and go for a while, as to which way the dice would fall. As the wrap press releases for my seven-year tenure attest (see Appendix H, page 63-78) a bold and aggressive strategy of change, and an expansion of artistic and geographical reach, proved successful in turning the fortunes of the festival around, and we not only rode a world-wide recession, but grew audience and revenue, bucking the trend in the arts worldwide.

Worryingly, in the last two years, while nonetheless remaining in the black, evidence shows that the OBF is again approaching a crossroads. From the outset of my tenure, I warned of the crisis that might face the OBF on Helmuth's inevitable retirement, as it fast became clear to me that the Festival depended fundamentally, not only on the administrative support of its parent organization, the University of Oregon, but on the generation of its founders, both on campus and in the wider Eugene-Springfield community, for its fiscal solvency. Helmuth Rilling wasn't the only individual who retired in 2013, so too did many of his most loyal and passionate supporters. And the donor, corporate, foundation, audience, and ticket revenue figures bear this out.

- From a high of $672K in individual giving in 2012, giving in 2013 and 2014 was down by more than $100K per annum, year on year

- Corporate giving from a high of $120,500 in 2012, went down to $91,660 in 2013; and down again to $56,570 in 2014

- Foundation and public grants fell from a high of $111,165 in 2012, to $93,793 in 2013, and fell again to $87,000 in 2014

The most worrying impact of these trends hit the [redacted] season, [redacted] first as [redacted].

Prior to [redacted] departure from the OBF to [redacted] in [redacted], [redacted] projected ticket sales of 17,675, budgeted at $531K, but on [redacted] arrival just a month before the start of the [redacted], identified all sorts of issues and inaccuracies in [redacted] projections that represented an almost $39K loss in ticket revenue right out of the box, because of 'troubled forecasting'. In addition to this, [redacted] opening and closing concerts (Monteverdi *Vespers* and the Verdi *Requiem*) lost $23,200 in revenue, and [redacted] projections for the Portland and regional series of concerts (12 concert in all) lost a further $73,923.

None of this is particularly surprising, given the following statistics that emerged as tickets went on sale:

- From the outset, Gold Ticket sales (the 'season ticket' for the entire season, that guaranteed the best seats and other benefits to major donors) was down by 22%
- Friends of the Festival households for the season (the backbone of our most loyal supporters) was down by 40%, representing a fall of 20% in private giving from donors below the $2,500 giving level of the Conductor's Society
- Corporate sponsorship for the season was down by 36%, and
- In Kind gifts for the season were down by a further 31%

But perhaps the most worrying statistics of all are that the only major concert that exceeded financial projections was [redacted] Mozart *Requiem* in Silva Hall, and while [redacted] was attracting an average annual audience for his Portland concerts of around 1700, and established a patron base of more than 2000 concert-goers for the OBF in the Portland market, [redacted] two appearances in Portland in [redacted] ([redacted]) attracted an average audience of 350.

It goes without saying that this is not a good position to be in, as the OBF enters the troubled waters of the coming decade. It's clearly not alone in this, as is demonstrated by the account of the turmoil that hit the arts world in the first four months of the 2014-15 concert season; but it will take real vision, managerial determination, and some tough decision and sacrifices, to put the Festival back onto the world stage.

The Vision Thing

First and foremost the OBF needs to decide what it wants to be in the coming years, and what its USP really is. While it was feeling its way in its first decade, as the Summer Festival of Music, by the 1980s the Festival had established its mission as a celebration of the music and legacy of the Johann Sebastian Bach, and the foremost choral-orchestral festival on the US scene. And, true to Rilling's mission as a teacher and communicator, education was at the heart of everything the Festival stood for. And fundamentally, that has not changed.

[redacted]. The 2015 season is a case in point. While [redacted] is conducting Haydn, Beethoven, Bruckner, Brahms and Mahler, and just one 25-minute Bach Cantata during the entire season, the heavy lifting in terms of Bach and the baroque is carried by (the *St. John Passion*) and guest conductor, (an orchestral program with and the Berwick Academy).

Moreover, the season ends with Mahler massive 90-minute Second Symphony (*Resurrection*), which requires a vast orchestra and two vocal soloists, with just eight minutes of chorus in the final movement.

The choice of closing the season with the Mahler both undermines the choral-orchestral mission of the OBF (unique in the US), and represents a serious financial risk in my book, especially, as [redacted] knows, both the Mahler, and Haydn's *Creation* (which opens the season) were performed by the Eugene Symphony at the Hult Centre during the last two seasons.

Recommendation

It should be a priority for UO leadership and the OBF's new Executive Director that an agreement should be reached about the artistic and strategic vision of the OBF going forward, not least because of the financial implications that necessarily follow.

OBF Management Structure

As the first two sections of this report demonstrate, there is a natural tension at play in the relationship between an arts organization's chief executive officer and its artistic director. In some institutions, the *BBC Promenade Concerts* (the largest music festival in the world), Carnegie Hall, New York, La Jolla Music Society and *SummerFest*, they are one and the same person; that's to say that the BBC Proms is led by a director that is both the chief executive and the artistic director, and Carnegie Hall and La Jolla are headed up by a President & Artistic Director who is one and the same person. This only works if the leader of the organization is a full-time resident of the institution, and not a performer, so in the case of La Jolla, the *Summerfest* also employs a Music Director, who is an independent contractor. In the case of American Orchestras, the President is the senior executive, and each employs a Music Director; the structure is similar at US Opera Houses, where the senior executive is the General Director, and each employs a Music Director. With some minor variations, and slightly different terminology, European orchestras and opera houses are similarly structured, but the term Intendant is generally used for the chief executive/artistic director.

The reason for this structure is that Music Directors are itinerant musicians, who travel extensively, often hold more than one directorship role internationally, and are only available for a fixed number of weeks and programs/productions each year.

At the OBF, having [redacted] and [redacted] perceived as (and often treated as) equals in partnership, meant that the UO's position as a parent organization was weakened, and [redacted] saw himself very much in the role of *animateur*, enabling [redacted] vision, even in the face of fiscal insolvency. As the Pappas report points out, this was in part a result of having an executive director that was, like [redacted] fundamentally a musician and not a manager.

It was for this reason that when my contract was renewed for the second time in 2013, my title was changed from Executive Director to General Director, and my third contract with the UO, and Matthew's first as OBF's artistic director, made clear that he reported to me, and I reported to the office of the Senior Vice-President and Provost. It was considered too risky to have an independent contractor (not a UO employee) who is contractually required to be in Eugene only three to four weeks each year, on an equal footing as a full-time UO director that would be held responsible for the fortunes of the OBF.

I have noted that the Interim directorship of the Festival and the search process that is presumably due to launch this winter, has also referred to an executive director, and its for this reason that I believe this to be

unwise. The buck has to stop somewhere, and it has to be with the OBF Director and not shared with a part-time, independent contractor.

Recommendation

The UO should consider the implications of demoting the General Director role to Executive Director. Remember, during the final [redacted] of [redacted] tenure, the OBF ran up a $1M deficit for the UO, [redacted]. The next chief executive needs to be a seasoned executive, with a similar pedigree and extensive business management training and arts management experience, if the OBF is to grow and thrive, as it should over the next decade. No artistic director will do this for you, and currently [redacted] within the community and throughout the State that one had hoped for. [redacted], and that is not, as yet, engaging with OBF's broader audience base.

OBF Staff Structure

During my seven-year tenure, 80% of the OBF staff base of 10 was replaced. This was not achieved over-night, but was the result of process of reassignment where skill sets were not up to the task, restructuring as needs demanded, annual appraisals that resulted in agreed stretch targets, retraining and annual goals, and giving people the chance to change and improve their performance.

Looking back on it, the writing was on the wall from the very outset. When asked, 'why do you do this, that, or the other, and what's the benefit of this approach?' the same answer invariably came back, 'because it's the way we've always done it.' All but one of the staff had never worked for an arts organization before, so all they knew, they had learnt on the job.

Despite the high staff turn-over, problems remain today within the team, primarily because of the difficulty of recruiting arts professionals to so small a community, where the Bach Festival is a big fish in a small pond, populated otherwise by community arts groups. We had a succession of failed searches over the past seven years; we were without a senior Development Director (or, for a year or so, without an [redacted] Development Director) for four season, including the 40th anniversary season in 2010, and Helmuth's retirement season in 2013!

Recommendation

UO leadership and HR should support the OBF's next chief executive in recruiting, as and when necessary, first-rate arts professionals, if the ultimate goal is for the OBF to operate in the big league.

The Board of the Friends of the Oregon Bach Festival

The Pappas report highlighted all the issues that relate to the Board (see Appendix F) so I will not detail them again here. Suffice it to say that, despite a botched job in revising the Charter and Bylaws of the Board in 2007, and subsequent changes in leadership within the Board, the individual members still fail to embrace their new role of fundraising and advocacy, as detailed in these Board documents. They have

never been the Board of the Festival, do not adequately represent the needs and opinions of the Friends of the Festival, nor do they assume any fiduciary responsibility for the OBF, because the OBF is a program of the UO, and reports to Johnson Hall. In reality they function as an advisory council, rather like that of the JSMA.

They have also negotiated for themselves a very advantageous gifting matrix, where the purchase of a gold ticket for the Festival season, and various other 'In Kind' gifts during the year are counted against their annual commitment of $2,500, which also gives them Conductor's Society privileges.

Meanwhile, many of the Board members have complained to me in the past year that the within the Board. The most recent Board meeting, to tie up end-of-year business just before the holidays, was called without sufficient notice, which further irritated many Board members.

Recommendation

I believe that it is time that the UO bites the bullet over this matter, and begins serious discussion with the current board over the revisions to the Charter and Bylaws that was drafted by Randy Geller and me (for the then Senior Vice President and Provost, Scott Coltrane) back in March 2014. This matter should really have been addressed back in 2007, when the JSMA was negotiating the repositioning of their Board, so it is long overdue. And as for the giving level and matrix currently in operation, one argument for the 'blended' approach, was to retain a level of diversity on the Board, but that has not in fact been the result of this cap on giving, it merely helps those [redacted]

Are we the Oregon Bach Festival or the Eugene Bach Festival?

For six of the past seven years the OBF has performed with notable success in the Portland market, and in collaboration with Portland Baroque Orchestra (and with the enthusiastic support of the Oregon Cultural Trust), we have toured the State each year, performing variously in Ashland, Astoria, Bend, Corvallis, Florence, Lincoln City, Newport and Portland. Given that the Portland market has the strongest economy and the highest concentration of Ducks of any community in the State, it was agreed with UO's Senior Vice-President and Provost, Linda Brady, and reinforced subsequently by Provosts James Bean and Scott Coltrane, that we should go where the money is, and engage with Portland Ducks at a time when the White Stag was established as the UO's 'campus' in the city. Despite the fact that the OBF had only once performed in the city, in the late 1970s (and then to a half empty house, we opened the 2008 Festival with Bach's B Minor Mass at the Arlene Schnitzer Concert Hall, and attracted an audience of 2323, earning $63,714 in ticket revenue. Over the last six years of Helmuth's tenure as artistic director, we attracted an average annual audience of around 1700 each year for his Portland concerts, earning annual ticket revenue of around $52,000. That's the equivalent of a sell-out at the Silva, or for Helmuth's Bachakademie concert venue, the Beethoven-Saal at the Liederhalle in Stuttgart! And while there were costs involved in artist fees, transportation and venue hire, it cost exactly the same to rehearse a program for one performance (in Eugene) as for two (in Eugene and Portland) so, as a strategy to break into the Portland market, it had considerable benefits, not least in terms of public perception and festival profile. In 2010 the OBF opened a second office at The White Stag, and the following year the Festival received a Portland Music Award for 'Outstanding Achievement in Classical Music' in recognition of the OBF's impact on the vibrant and diverse music scene in the city within a period of just four years.

Given the success of this strategy, it has been one of the greatest frustrations of my tenure at the OBF that the Portland strategy has not been supported by OBF marketing or development, both departments being at a loss to know what to do to advance the strategy between seasons, because the simply didn't understand the more sophisticated urban Portland market.

Recommendation

Together with the new chief executive, UO leadership needs to take a long-term view of the OBF's Portland and Statewide strategies. If Portland and touring are to remain on the agenda, then the new chief executive needs to be supported in that strategy by OBF's marketing and development staff.

If not, then don't waste more time or another penny, pull out of the market beyond Eugene, and close down the OBF's White Stag office. I would favor and recommend building on the foundations laid down these past seven years, and invest further in the statewide program.

Thinking outside the box: popular programming, new media, branding and communications

There are many lessons to be learnt from the evidence of part two of this report, with regard to the fast-changing and depressed arts market that is on the horizon. If you consider the number of arts organizations in crisis during the last four months of 2015, and the exodus of music directors when the going gets tough, and Kent Nagano on the decline in music education and the impact that has had on two generations of prospective classical music patrons, one can see that change is now very necessary and it has to be faster than our competition, our customers, and our business in general.

It is broadly agreed within the profession that most of our business models don't work in today's arts environment, and that is certainly true within the orchestral sector, where fixed costs are very high.

Some are reluctant to risk popular programming, beyond the traditional kids concerts and holiday specials, and others are slow to take up the opportunities offered by new media, and a fresh approach to the concert-giving experience, and broadly speaking we still indulge in old established methods of marketing and communications.

But then consider those organizations that are not afraid to fail, but take calculated risks as a matter of course. At the BBC Promenade Concerts last summer, Metropolitan Opera star Deborah Voigt duetted with American-Canadian composer and singer-songwriter, Rufus Wainwright, and the UK's legendary electronic pop duo, the Pet Shop Boys, made their Proms debut giving the world premiere of *A Man from the Future*, their new piece for electronics, orchestra, choir and narrator, inspired by the life and work of Alan Turing – the genius who broke the German Enigma code during the Second World War and formulated the concept of the digital computer.

And more recently, the Tanglewood Festival (the Berkshires summer home of the Boston Symphony Orchestra) announced that Tony Bennett would appear during next summer's festival, in concert with Lady Gaga!

Over the past seven years, some of the 'alternative' events introduced into the mix (including Garrison Keillor's 2008 show, written specially for the combined OBF/SFYCA forces; Jamie Bernstein's 'Bernstein Beat' kids concert, presented in flawless bilingual style, in Spanish and English, for our Latino community; Astor Piazzolla's keyboard player, Pablo Zielger, with his jazz tango trio; the Cuban all-star band Tiempo Libre; Bobby McFerrin in concert with the Stangeland Family Youth Choral Academy; Tony Award-winner, Savion Glover, tap dancing to the music of Bach, Mendelssohn and Stravinsky;

harmonica virtuoso Joe Powers tangoing the night away with his band at Beall Hall, and the two sell-out appearances of Pink Martini, the second a smash-hit outdoor concert at Cuthbert Auditorium) have been the most successful in attracting new audiences to the Festival.

Recommendation

Having a strong and adventurous popular dimension to the festival does not undermine the core mission, but can (if programmed well) change perceptions within the community about the exclusive nature of the OBF, and attract a broader demographic to bolster our core audience. In certain cases, these can be money-spinners (if well negotiated with managements and agents), and yield a modest profit to underpin the rest of the more traditional fare. And as far as marketing, communications and new media are concerned, read April Libman's Marketing Plan (Appendix J) she's right on the money!

Talent inflation in the arts market, and the risks for the OBF in the future

Perhaps, not surprisingly, so much of the crisis in the arts today is about money: about reduced state and donor funding; about out-of-date business models where fixed costs of talent and venues are a factor; about the decline of arts patrons and ticket buyers; about the failure of today's audiences to replace the vacancies of yesterday's.

When I arrived here from the BBC in 2007, I was [redacted] the choral stipend and orchestral rates paid to OBF musicians, and the degree to which we depended on the charity of our soloists and rank-and-file musicians, who returned, year after year, almost in pilgrimage, in support of .

While this was all well and good while Helmuth was at the helm, what troubled me was the impact of his retirement (and the) when these pilgrims had to be replaced. So over the past seven years, as funds allowed, and with the cooperation of the AFM (the US Musicians' Union) orchestral rates have increased by 12.4%, the chorus stipend has increased by 37.9% (they were working at a loss, when travel and other expenses were taken into account), and our Program Director fees have increased by 78%. These increases might, on the face of it, seem steep, but they only served to bring fees up to the lower end of the industry norm in the States. For instance, only this past fall have we brought orchestral session rate in line with the Eugene Symphony, but while they depend on community-based musicians, we draw our pool of players from some of the leading orchestras in the US and Europe.

We are not in a particularly strong position when it comes to soloists' fees either. was able to [redacted] from young artists who he took under his wing, and used extensively in Bachakademie engagements in Stuttgart and on tour across the world. [redacted] is not yet in the same position to [redacted], as he rarely has a free rein when engaging soloists for his opera or orchestral engagements, and he doesn't enjoy the same music director role with another arts organization. So, aside from the younger generation of artists, for [redacted] shows we are very much at the mercy of the industry, whether we're engaging orchestral players or vocal and instrumental soloists. The days when the 'special OBF rate' is a viable negotiating tool are fast coming to an end.

Recommendation

Factor in talent inflation on an annual basis, especially as we are now recruiting no fewer than three orchestral ensembles a season (the OBF symphony orchestra, OBF period orchestra, and the Berwick Academy), and be sure not to over-extend our ambitions year-on-year. We introduced two new educational programs in 2014, and the Berwick Academy launches in 2015, and Matthew has some very large-scale repertoire on his wish list, including Elgar's *Dream of Gerontius*, Britten's *War Requiem*, and Mahler's *Symphony of a Thousand*!

Philanthropy in the arts is itself a dying art

In conversation with Andy Berwick last summer, he talked about the crisis facing so many US orchestras (from his perspective as a Life Governor of the San Francisco Symphony Orchestra) where the 'old families' that had traditionally been the backbone of philanthropy for these institution, but as these die off, there is no guarantee that their descendants have anything like the same motivation to give, and if so, were not giving to the arts. And this is borne out by the findings of April Libman's Marketing Communications Plan (Appendix J, page 91), where the focus of philanthropy would seem to have moved away from the arts, in favor of education, health and environmental needs.

This may account for the fall in individual and corporate giving over the past two years, and on an anecdotal basis I can share the opinions of

. Worryingly, in the case of many of these individuals, there is little or no indication whatsoever that the next generation will honor the past commitments of their parents.

Recommendation

The key to turning this situation around is to ensure that Matthew and his successors in the coming years takes time to participate on marketing and communication enterprises, and really engage with the community and its key individuals and potential donors. None of these people are going to give to the festival is they are not engaged by the product, so we need to get them through the concert hall doors, or take our product to where they hang out socially.

Management Succession

One of the key risks in management succession that follows a period of intense change is the inclination to assume that a gentle hand on the tiller will steer the ship through calm water. Firstly, the calm water is never as calm as one would wish, and is more likely to bring with it a different sort of turbulence. Nothing on the international arts scene today would suggest that my successor will have an easier time of it, than I had.

Recommendation

The next chief executive will have to face many tough challenges, so for the sake of the OBF and the UO, I would strongly recommend that the University appoints an experienced, seasoned professional that isn't going to shy away from the realities of life in leading the OBF to even greater heights.

APPENDICES

Appendix A

Oregon Bach Festival: History

In 1970 German organist and conductor Helmuth Rilling came to the University of Oregon for a series of workshops and an informal concert. Since then the Oregon Bach Festival—through the efforts of Rilling, co-founder Royce Saltzman and a cadre of volunteers, musicians, patrons and donors—has blossomed into one of the foremost celebrations of Bach's music and legacy in the United States.

That first collaboration between Rilling and Saltzman was modest, culminating in a concert of short choral and organ works. But in 1971, under the banner of the "Summer Festival of Music," four concerts were added to the schedule, including a complete performance of Bach's *St. John Passion*. Over the next few years, the Festival expanded to include performances of major choral-orchestral works, instrumental and chamber concerts, solo recitals, workshops, and master classes. As the decade closed, the event was renamed the Oregon Bach Festival, more clearly defining the Festival's location and honoring the composer who inspired the founders.

As an outgrowth of the University of Oregon's School of Music, the Festival was originally housed at UO's Beall Concert Hall, one of the finest chamber recital rooms in North America. With the opening of the Hult Center for the Performing Arts in 1982, the Festival was able to expand and attract renowned performers of the highest caliber.

Such internationally regarded artists as Arleen Auger, Sylvia McNair, Frederica von Stade, Ben Heppner, Thomas Quasthoff, Jeffrey Kahane, Robert Levin, Ya-Fei Chuang, Nicholas McGegan, Sarah Chang, Midori, Joshua Bell, Yo-Yo Ma, Bobby McFerrin, Savion Glover, Tiempo Libre, the Pablo Zielger Trio for Nuevo Tango, The 5 Browns, and Pink Martini have been introduced to the Eugene-Springfield community, courtesy of the OBF. Members of the Festival chorus and orchestra come from professional organizations throughout the United States, Canada, and Europe and return year after year.

In 2008, under the leadership of a new executive director, John Evans (former Head of Classical Music at the BBC Radio in London) the Festival expanded its geographic reach to Portland and began to diversify its programming, with artist residencies and partnerships, notably with the Portland Baroque Orchestra, and a co-production with the UO's School of Music and Dance of the *ChamberMusic@Beall* series during the Fall and Winter concert seasons. Since 2008, the Festival has continued to extend its statewide reach, with an annual *BachFest PDX* series in Portland, and concerts in Ashland, Astoria, Bend, Corvallis, Florence, Lincoln City, and Newport. Another transition of leadership was initiated in August 2011, when the Festival named British conductor Matthew Halls artistic director designate, and with the "Passing of the Baton" concert at the 2013 festival, Halls succeeded Rilling as artistic director.

The 2009 world première of Sven-David Sandström's *Messiah* is one of many examples of the Festival's commitment to celebrating the Bach legacy with new commissions. In 2001 Helmuth Rilling won a Grammy award for Best Choral Performance for the Festival's world première recording of Krzysztof Penderecki's *Credo*, and the "Passing of the Baton" concert in 2013 included a special OBF commission from Scottish composer, James MacMillan, to celebrate Rilling's 80th birthday. McMillan is currently writing a Bach-inspired cantata commissioned for OBF 2016.

Education has always been the heartbeat of the Festival. The master class in conducting offers advanced training in choral and orchestral conducting. Over the years it has served more than 1,200 conductors

from across the U.S. and around the world. In 2013 the Festival re-launched the Rilling Endowment to support this master class program, in honor of the founding artistic director's legacy.

The Discovery Series format Rilling pioneered in Eugene—involving the master class program, lecture-demonstrations, and concerts—became the model for the Internationale Bachakademie Stuttgart, which he founded in 1981, as well as for subsequent Bach academies Rilling led in Eastern Europe, South America, and Asia. Meanwhile the OBF's Stangeland Family Youth Choral Academy, provides an intensive training and performing experience for high school singers from across the country; and in 2014 the Festival launched its new OBF Organ Institute and its Vocal Fellows program, and will soon announce plans for its new HIP (historically informed performance) training orchestra, The Berwick Academy, for graduate student and young professionals, to be launched during the 2015 Festival.

Festival concerts have reached worldwide audiences through broadcasts on National Public Radio, American Public Radio, Voice of America, and the European Broadcasting Union, and via both the British and Canadian broadcasting corporations. Writers from *The Times* of London, the *Los Angeles Times*, and the *Wall Street Journal* have praised the Festival for its *"pioneering approach to programming"*, describing it as "*virtually without equal in America*" and "*one of the world's leading music festivals*." The Festival's Digital Bach Project (funded by the Hinkle Charitable Foundation and accessed via the OBF website) was launched in 2011 to extend the Festival's reach with interactive explorations of the *B Minor Mass, Goldberg Variations, St. Matthew Passion*, and the *Well-Tempered Clavier*.

As Festival artistry has grown, so has funding from public and private supporters as KeyBank, American Airlines, Bigfoot/Pepsi-Cola, Wildish Companies, Valley River Inn, National Endowment for the Arts, Oregon Arts Commission, Oregon Cultural Trust, the Paul G. Allen Family Foundation, the James F. and Marion L. Miller Foundation; and both the Silva Endowment and the Nils and Jewel Hult Endowment of the Arts Foundation of Western Oregon through the Oregon Community Foundation. Important individual contributions have come from thousands. In particular, the Scharpf family and Bill Bowerman helped to sustain artistic funding during a critical time in the early 1980s; and thanks to the leadership of J. Peter and Mary Ann Moore, and Andrew and Phyllis Berwick, the $10 million Saltzman Endowment completed in 2010, has provided substantial funding stability for the future.

For more than four decades the masterworks of Bach, and his legacy down the ages, have found enthusiastic and committed audiences in the Pacific Northwest through the Oregon Bach Festival. As it approaches its 50th anniversary season in 2020, the OBF is committed to honor the past, cherish its legacy and celebrate what promises to be an illustrious future.

Appendix B

Helmuth Rilling

Founder Artistic Director, now Director Emeritus, Oregon Bach Festival

'Music should never be merely comfortable, never fossilized, never soothing. It should startle people and reach deep down inside them, forcing them to reflect.'

Helmuth Rilling

Helmuth Rilling continues to be one of the world's preeminent interpreters of Bach and conductors of the choral-orchestral repertoire. He served as artistic director of the Oregon Bach Festival — one of the most expansive and critically acclaimed platforms for Bach's music in America — since its inception in 1970. Handing over his role of artistic leader to Matthew Halls July 15, 2013, Rilling now serves the Festival as a director emeritus.

Born in 1933 in Stuttgart, Germany, Rilling studied at the State Music Academy with Hans Grischkat, Johann Nepomuk David, and Karl Gerok and at the Conservatorio di Santa Cecilia in Rome with Fernando Germani. Concentrating on conducting, choral music, and the life and work of Johann Sebastian Bach, he founded the Gächinger Kantorei in 1953 and its resident orchestral ensemble, the Bach-Collegium Stuttgart, in 1965. After studying with Leonard Bernstein in New York in 1967, Rilling became professor of choral conducting at the State Music Academy in Frankfurt, a post he held until 1985. He also conducted the Frankfurter Kantorei there until 1981.

Teaching has always been a central focus of Rilling's. His work at the Oregon Bach Festival has led to invitations to teach at such schools as Indiana, Temple, Iowa, St. Olaf, Baldwin-Wallace, Westminster Choir College, Yale, and USC. In 1981, he founded the Internationale Bachakademie Stuttgart (modeled largely on his achievements at the Oregon Bach Festival), an institution that further inspired similar Bach academies in Buenos Aires, Cracow, Prague, Moscow, Budapest, Tokyo, and Taipei. His emphasis on reaching young musicians led to the founding of the OBF's Youth Choral Academy in 1998 as well as major youth ensembles in Stuttgart.

His distinctive, insightful lecture-demonstrations of Bach's *B Minor Mass* and the *St. Matthew Passion* have been recorded in more than five hours of high-definition video and are available worldwide through the OBF's Digital Bach website, digitalbach.com.

Rilling has appeared as guest conductor with virtually all of the world's important music institutions, including the Chicago, Cleveland, and Toronto symphony orchestras and the New York, Vienna, and Berlin philharmonics. His 2011–12 season included concert tours of China and South America with the Bach-Collegium Stuttgart and Gächinger Kantorei, a Bach academy in Taipei focusing on the *St. Matthew Passion*, and a performance of Mendelssohn's *Elijah* at the Kennedy Center. In 2013 he continued his history of guest-conducting appearances with the Los Angeles Chamber Orchestra and has a scheduled tour of the *St. Matthew Passion* to South America.

A believer in the power of music to cross political boundaries, Rilling has built a special relationship with the Israeli Philharmonic. He was the first German conductor to lead an orchestra in that country and has since returned more than one hundred times. He conducted the musical portions of Germany's official reunification ceremonies in 1990. In 1994, his Stuttgart Bach academy was awarded the UNESCO Music

Prize, and in 1995, he received the Theodor Heuss Prize for advancing reconciliation and international understanding.

In 2003, he became an Honorary Member of the American Academy of the Arts and Sciences, joining the company of such luminaries as Kofi Annan, Walter Cronkite, Alfred Lord Tennyson and Albert Camus, and in 2008 – on the occasion of his 75th birthday – he was awarded the Staufer Gold Medal, the highest award of his German home state of Baden-Württemberg.

His stature in the music world was further acknowledged in November 2011, when he accepted the Herbert von Karajan Music Prize, joining the company of such artists as Anne-Sophie Mutter, the Berlin Philharmonic, Russian pianist Evgeny Kissin, and conductor-pianist Daniel Barenboim. In October 2012, he was the seventh recipient of the Martin Luther Medal of the Council of Germany's Evangelical Church, part of ceremonies leading up to the 500th anniversary of the Protestant Reformation in 2017.

His commitment to new music has led to many commissions, including several new works by Wolfgang Rihm, the *Water Passion* by Tan Dun and *La Pasion Segun San Marcos* by Osvaldo Golijov, the *Messiah* by Sven-David Sandström, and Krzysztof Penderecki's *Credo*, for which Rilling and the Oregon Bach Festival won a Grammy award in 2001. Among his many volumes of recordings are the complete works of Bach, totaling 172 compact discs, issued in 2000 to commemorate the 250th anniversary of Bach's death — a proud legacy of Rilling's lifelong devotion to the celebration of Bach's genius.

Rilling's final season as OBF's artistic director was both a tribute to his 44-year legacy and a celebration of his 80th birthday, and it was marked by a series of commissions, honors and awards. In the run-up to the 2013 Festival, Rilling received Eugene's Arts and Letters award, and Chorus America's Distinguished Service Award. The Festival commissioned an *Alleluia* in his honor (inspired by Bach and underpinned by a quote from one of Bach's favorite Lutheran chorales) from the Scottish composer, James MacMillan; and on the final evening of the 2013 season, John Evans, OBF's President & General Director, presented Rilling with a special hand-bound facsimile of MacMillan's score in a special presentation case, at a community salute to the maestro at the Hult Center. During the same ceremony, Oregon State Representative, Phil Barnhart, honored Rilling with a resolution from the State of Oregon, proclaiming the conductor's contributions to the cultural life of the state; and in an exclusive Conductor's Society reception later in the evening, UO President Michael Gottfredson presented Rilling with his third honor from the University of Oregon, its Presidential Medal. Rilling became the first person in the history of the university to have been honored with all three of its highest awards, having previously received the UO's Distinguished Service Award in 1985 and an Honorary Doctorate in 1991. "Each in its own way memorializes the very best in human endeavor," said President Gottfredson. "Tonight, you [Maestro Rilling] become the first person in the history of our university to have been honored with all three of these awards."

Appendix C

Royce Saltzman

Founder Executive Director, now Director Emeritus, Oregon Bach Festival

Royce Saltzman cofounded the Oregon Bach Festival with Helmuth Rilling in 1970. Under Saltzman's leadership, the Festival grew into one of the preeminent classical music festivals in the United States, with a catalog of CD recordings, high-profile premieres, a series of international broadcasts, recognition in the major news media, educational programs for all levels of experience, and elite standing in the choral music profession.

Following the 2007 Festival, Saltzman stepped away from administrative leadership and continues to serve the Festival in emeritus capacity and as a director of the Board of the Friends of the Festival.

Saltzman earned a bachelor's degree from Goshen College, a master's degree from Northwestern University, and a doctorate from the University of Southern California.

A University of Oregon faculty member since 1964, he served as associate dean of the School of Music for twelve years.

Beyond his work with the Festival, Saltzman became a leader in the world choral community.

From 1979 to 1981 he was national president of the American Choral Directors Association, and from 1985 to 1993 was president of the International Federation for Choral Music, a worldwide organization that includes national organizations, choirs, and conductors in more than seventy countries.

He served on five panels of the National Endowment for the Arts; was honorary advisor to the China International Choral Festival in Beijing; served on the Board of Directors of the Internationale Bachakademie-Stuttgart and on the Advisory Board of the Academia Bach de Venezuela in Caracas; and was a member of the Honorary Committee of Zimriya, the world Assembly of Choirs in Israel.

In 1994 he received the Order of the Cross of Merit, Germany's highest political-cultural award. Among his numerous awards and citations are the University of Oregon's Distinguished Service Award; distinguished alumni awards from Goshen, Northwestern University, and USC's Thornton School of Music; and the Eugene (Oregon) First Citizen award.

In 2010 Saltzman was the inaugural recipient of the Distinguished Service Award from Chorus America, the nation's leading service organization for the choral community.

Appendix D

Dr John Evans

President & General Director, Oregon Bach Festival, 2007-2014

John Evans was born in 1953 in South Wales, United Kingdom, where he studied at the University of Wales, completing his doctoral thesis on Benjamin Britten in 1984. He has lectured extensively on Britten throughout the UK and North America, and his many publications include *Benjamin Britten: Pictures from a Life 1913–1976* (Faber & Faber); *A Britten Source Book* (Britten-Pears Library Publications); contributions to *The Britten Companion* (Faber & Faber); and opera handbooks on *Peter Grimes, Gloriana, The Turn of the Screw* and *Death in Venice.* Two years after joining the OBF, Faber & Faber published his most recent scholarly study of the composer, *Journeying Boy: The Diaries of the Young Benjamin Britten 1928 – 1938,* which was greeted with high acclaim as one of the most distinguished publications to appear in the run-up to the much-anticipated Britten centenary celebrations in 2013.

Evans began his professional career in 1978 as administrator of the Britten-Pears School for Advanced Musical Studies at Snape Maltings, and for five years (from 1980 to 1984) he was Research Scholar at the Britten-Pears Library & Archive at Aldeburgh. He joined the British Broadcasting Corporation in 1985 as a music producer for BBC Radio 3 (the UK's nationwide cultural station) becoming senior producer for opera the following year; chief producer of the BBC Singers in 1989; editor of the daytime schedule in 1991; and head of Radio 3 Music in 1993. In 1998, he assumed executive and artistic responsibility for the BBC's Orchestras and Choirs, and in 2000, he became head of Music Policy and Production for the station.

During his eight years as a producer for Radio 3, Evans specialized largely in the production of live music, but also made two highly acclaimed documentaries on the life and work of the tenor Sir Peter Pears and the legacy of the Russian conductor and commissioner of new music, Serge Koussevitsky. As an executive producer, he was responsible over two decades for many of the network's landmark projects, including *A Britten Evening; A Bernstein Day* (live from New York); *Live from Tanglewood* (a weekend of broadcasting, live from the summer home of the Boston Symphony Orchestra); *Danube Week; Barcelona Nights; Dutch Week; A Festival of Britten;* and *Listen Up!* — a month-long broadcast festival celebrating the diverse activities of UK Orchestras. In May 2005, in his last year at the BBC, he directed Radio 3's UK-wide *Leonard Bernstein Season,* and presented *Performing Britten,* a ten-part radio series on the Britten opera. Dr. Evans's awards have included the coveted Sony Gold Award for Broadcasting Event of the Year in 1996 for *Live from Tanglewood,* and a Prix Italia and Royal Philharmonic Society Award as music producer for the BBC film version of Bela Bartok's opera, *Duke Bluebeard's Castle.*

Evans joined the Oregon Bach Festival in the summer of 2007, succeeding cofounder Royce Saltzman. Under his leadership the Festival has broken all box office records twice in seven years, and has expanded its seasonal and geographic reach with syndicated broadcasts, co-productions with Portland Baroque Orchestra and with the UO School of Music and Dance *ChamberMusic@Beall* recital series, and promoted OBF concerts in Ashland, Astoria, Bend, Corvallis, Florence, Lincoln City, Newport, and Portland, where it now produces a summer concert series in conjunction with the Eugene-based festival. The success of the Festival's Portland strategy was recognized by the Portland Music Awards, when the OBF received the accolade for the most outstanding achievement in classical music. Also in June 2011, the OBF launched the Digital Bach Project, a comprehensive multimedia exploration on the OBF website of Bach's B Minor Mass underwritten by the Hinkle Charitable Foundation. The site, for which Evans

served as executive producer, now includes many hours of high definition video of OBF Founder Artistic Director Helmuth Rilling's lecture-concerts, with extensive additional material on the *B Minor Mass*, *St Matthew Passion*, *Goldberg Variations*, and the *Well-Tempered Clavier*.

While resident in the States, Evans served on the boards of Chorus America and All Classical Portland. In addition to his work stateside, Evans has served as vice president of the Welsh Music Guild, as a director of The Britten Estate Ltd., as a trustee of the Britten-Pears Foundation, and is currently a trustee of the Britten-Pears Will Trust. He has served on the Juries of the Lisbon and Kondrashin International Conducting Competitions, the Laurence Olivier Awards, the British Academy of Composers and Songwriters Awards, the BBC Singer of the World and Tosti Singing Competitions, and has chaired the juries for the Royal Philharmonic Society Awards, BBC Choir of the Year competition, the Prix Italia and the Vienna Television Awards.

Appendix E

Matthew Halls

Artistic Director (2014-2016)

One of today's leading young conductors, Matthew Halls was named OBF Artistic Director Designate August 24, 2011 and became the Festival's Artistic Director July 15, 2013.

The word "versatile" is often applied to musicians; in the case of the British conductor Matthew Halls, it is particularly well deserved. Although he first came to prominence as a keyboard player and early music conductor, Halls, still in his thirties, is now better known for his dynamic and intelligent work with major symphony orchestras and opera companies, and for his probing and vibrant interpretations of music of all periods.

In July 2011 he appeared for the first time at the Oregon Bach Festival. Such was the impact of his performances there, he was immediately asked to succeed Helmuth Rilling as Artistic Director at the close of the 2013 Festival. His inaugural Festival included performances of Verdi's Requiem, Monteverdi Vespers as well as his own reconstruction of Bach's St Mark Passion. Summer 2015 sees the Oregon Bach Festival launch the Berwick Academy for Historically Informed Performance under his leadership, a new national training program for advanced students.

In 2013, he made his Toronto Symphony debut, performing a critically acclaimed interpretation of Beethoven's Ninth Symphony and is reinvited this season for their Mozart Festival. He first led Washington, D.C.'s National Symphony in 2011, with performances of Handel's *Messiah* returning the following season to lead works by Ravel, Dutilleux and Vaughan Williams and this season with Poulenc and Mendelssohn. Other recent and upcoming North American engagements include his debut with the Philadelphia Orchestra and appearances with the Cleveland Orchestra, Houston Symphony, Indianapolis Symphony, Los Angeles Chamber Orchestra, Ottawa's National Arts Centre Orchestra and the Seattle Symphony Orchestra, in repertoire from Bach and Handel to Beethoven, Kernis, Mendelssohn, Messiaen, Mozart, Rachmaninov, Tchaikovsky and Tippett.

European orchestras are equally eager to welcome Halls to their podiums, including the BBC Scottish Symphony, Bergen Philharmonic, Bremen Philharmonic, Frankfurt Radio Symphony, Iceland Symphony, Musica Viva Moscow, Royal Northern Sinfonia, RTE National Symphony, Tonkünstler Orchestra NÖ, and regular appearances in Austria and on tour with the Salzburg Mozarteum Orchestra with whom he appears at the 2015 Salzburg Festival. Last season he appeared with Concentus Musicus Wien at the Internationale Barocktage Stift Melk, marking the start of collaborations between the orchestra and guest conductors. This season he is invited to Australia to conduct the Adelaide, Melbourne and West Australian Symphony Orchestras.

In the opera house, his repertoire covers Renaissance, Baroque and Classical works, but also extends to later works, with a particular focus on Britten. Spring 2014 saw him lead Handel's *Ariodante* at the Aalto-Musiktheater *Essen and he* has appeared with companies such as the Handelfestspiele Halle and the Salzburg Landestheater. His debut performances of Handel's *Rinaldo* with Central City Opera Colorado were so well received that he was reinvited to conduct not only Handel's *Amadigi* but also Puccini's *Madama Butterfly*. His associations with both the Netherlands Opera and Bayerische Staatsoper have included productions of Verdi's *Luisa Miller*, Britten's *Peter Grimes* and Bellini's *Norma*.

Halls is represented on disc with Handel's *Parnasso in Festa,* winner of the Stanley Sadie Handel Recording Prize, released by Hyperion. On Linn Records, he has recorded a set of four Bach Harpsichord Concertos conducted from the keyboard, and Bach's Easter and Ascension oratorios, as well as award-winning discs of Purcell's Sonatas in Three and Four Parts.

Matthew Halls was educated at Oxford University and subsequently taught at the University for five years. Following his time in Oxford, he has held positions as Artistic Director of the King's Consort and the Retrospect Ensemble. Passionately committed to education and working with young musicians, he has taught regularly at summer schools and courses.

APPENDIX F

OREGON BACH FESTIVAL

STRATEGIC AND ORGANIZATIONAL ASSESSMENT

By the Pappas Consulting Group Inc.

INTRODUCTION

The Pappas Consulting Group Inc. was engaged by the Senior Vice President and Provost of the University of Oregon to conduct a strategic and organizational assessment of the Oregon Bach Festival (OBF or the Festival). The study's objectives were to assess:

1. The organizational and governance structure of the Festival;
2. The programming and marketing functions of the Festival, with a focus on increasing the Festival's audience as well as the timing and the length of the Festival; and
3. The capacity for expanding the Board's role in fundraising and development.

This report first sets the context for this high level review. The next section of the report articulates findings and recommendations relative to: the legacy of the OBF's Founders; governance; organizational structure and management reporting; fundraising and development; marketing and programming and business, and budget practices. The last section of the report outlines next steps for further analysis and action.

SETTING THE CONTEXT

The Oregon Bach Festival is remarkable in the annals of both the performing arts and American higher education. In just thirty-six years from its founding, the OBF has served as a major international force in the celebration of Bach's music and the creation of highly acclaimed commissioned works. In addition, it is renowned for its provision of master classes, solo recitals, workshops, instrumental and chamber concerts, and major choral-orchestral works.

Its illustrious Founders, Helmuth Rilling and Royce Saltzman have partnered their creative genius to satisfy the artistic passions of many who reside in Eugene, the region, the University and the world. As the Founders are still "in-charge" of the OBF, there is a rich legacy of experience and vision. Concurrently, there is the commitment at the University and Board level to plan intentionally at both the strategic and operational level to ensure that succession planning is carried out with style, integrity and grace, and in a manner that ensures the legacy of the Founders through the long-term continuation of the festival.

The next section of this report enumerates the major findings of this high level review and poses some recommendations for consideration by the University of Oregon leadership in partnership with the Oregon Bach Festival Board.

FINDINGS AND RECOMMENDATIONS

The Legacy of Helmuth Rilling and Royce Saltzman

In 1970, Helmuth Rilling came to Eugene for a series of workshops and an informal concert. At the time, Royce Saltzman was a member of the faculty of the School of Music at the University of Oregon. Their first collaboration in 1971 laid the groundwork for the "Summer Festival of Music" which later became known as the Oregon Bach Festival.

Since that early collaboration, the OBF has emerged as a major force in the music world on a regional, national and international basis. In his role as Artistic Director, Helmuth Rilling has brought his creative and artistic genius. In his role as Executive Director, Royce Saltzman has enabled the OBF to expand its repertoire and become a 'Jewel in the crown" of the University of Oregon.

This longstanding collaboration has enabled the Festival to establish a legacy of which the Founders should be proud. This pride is certainly shared by the President of the University of Oregon and members of his senior leadership team as they have committed significant University resources - at both the financial and psychic level - to sustain the Festival and position it for its next generation of growth and development.

On the other hand, this extraordinary partnership of the two Founders poses some immediate succession planning issues. Our experience working with organizations undergoing Founder leadership transitions tells us that the transition can be very difficult emotionally for the Founder/s. This is most especially the case with the OBF.

First, there are two Founders who have worked essentially "as one", compounding the ability for a smooth transition as the two Founders are clearly on two different succession-planning schedules. The second is the lingering memory of the failed Saltzman transition that occurred almost a decade ago and resulted in the reemergence of Saltzman in the role as Executive Director.

Recommendations

The University of Oregon should work with the Executive Director over the next several months to plan and implement a thoughtful and timely transition of the Oregon Bach Festival. Royce Saltzman's request for such a transition would enable the OBF Board and the University along with Helmuth Rilling to celebrate Mr. Saltzman's many contributions to the Festival and the community at large. In this scenario, Saltzman would assume the position of Executive Director Emeritus upon the appointment of a new Executive Director, which should occur at a time that is mutually agreeable with Saltzman and the University administration.

During the period following the appointment of a new Executive Director, Saltzman would work with the new Executive Director to ensure a smooth transition and the success of the upcoming Festival.

Prior to announcing the transition, the University needs to craft a position description that accurately reflects the anticipated role of the new Executive Director and that incumbent's role and relationship to the Festival's Music Director. This can build on work already done by the Board. This will require a series of working sessions with both the retiring Executive Director as well as the Artistic Director with a third party to ensure that the Festival's and the University's best interests are kept in mind. This will not be an easy task, but will be essential to a successful management and leadership transition at all levels.

The approved position description should then be posted after the announcement of the Executive Director's intention to transition to Emeritus status. A Search Committee should be named at the same time. The Search Committee should be chaired by a faculty or staff member of the University of Oregon and should have volunteers and members of the OBF Board. The position should be filled no later than several months prior to the following Festival, which would enable a smooth transition.

The Executive Director Emeritus should be asked to serve in a fundraising, development and advocacy role during this transition and thereafter, using his exceptional ability with people and his keen reputation in the music world. Consideration should also be given to making the Executive Director Emeritus a life-long, *ex-officio* member of the Board.

Governance

Former President Myles Brand signed the Charter and by-laws of the Friends of the Oregon Bach Festival on June 2, 1992.

Section 1 states: "The mission of this organization shall be to serve the Oregon Bach Festival by assuming responsibility for development and financial support and by taking a leadership role in advocacy which shall enhance the artistic merit of programs and the economic and educational impact of the Oregon Bach Festival."

Section 2 describes the OBF's purpose to: "act as advisors to the Festival's Artistic and Executive Directors on any matters the Directors bring before the Friends or on matters generated within the organization; assist with fundraising for the Festival; assist with promotion, public relations, and advocacy related to the Festival; and assist with the coordination of receptions, hosting of artists, and other hospitality events related to the Festival."

In our view, Sections 1 and 2 define the Board's role primarily as that of fundraising, development, advocacy and programmatic input as contrasted with governing boards that have fiduciary responsibility.

However, upon further review and analysis of the Charter and by-laws, the Board is charged to assume responsibility for tasks more typically assigned to a governing board rather than an advisory or fundraising board. For example, in the section entitled, *Powers of the Board,* the Board is to "share with the University of Oregon in the power of appointment for leadership positions, for example Executive Director and Artistic Director, when those positions are not University of Oregon positions."

In addition, the Board is charged to "participate in and concur with preparations of an operating budget for each fiscal year. The proposed budget shall be approved by the Board and reviewed and approved by the Dean of the Music School of the University and the Provost of the University." In fact, in recent years, neither the Dean of Music nor the Provost has been asked to review or approve the budget. The section entitled, *Responsibilities of the Board,* enumerates the Board's charge to "monitor the operating budget of the Festival on a monthly basis" and "assist the Festival staff and School of Music Dean in setting priorities for fundraising."

Further, the organizational structure of the Board includes such committees as: Executive; Long Range Planning; Education; Marketing and Public Relations; Development; Special Projects; Endowment; and Nominating. This committee structure further reinforces the perception that the Board of Directors is a governing board rather than an advisory/fundraising board.

The bottom line is that the Charter and by-laws along with the organizational structure and management reporting mechanisms in place (See Organizational Structure and Management Reporting section of this Pappas Consulting Group Inc. report) have created an untenable situation with regard to the on-going leadership and financial viability of the OBF. Our attendance at the January 10, 2006 Board meeting and the first-hand knowledge gained as a result, only reinforces this conclusion.

Recommendations

The 1992 Charter and by-laws need to be drastically revised. Indeed we would go so far as to recommend their wholesale rewrite to create a Board that has as its primary responsibility fundraising, development, advocacy, and program input functions, leaving the day-to-day management and operations (including personnel, budget, business practices) in the hands of the staff of the University of Oregon who, in turn, would be held responsible and accountable for this operation.

This will help to get the Board focused on significant fundraising and development efforts in partnership with the Director of Major Gifts assigned to the OBF by the University of Oregon development office. It will get the Board out of its current untenable position of "managing" the Executive Director and the Artistic Director without the authority (or the expertise) to do so, and get the highly motivated and dedicated Board focused on the revenue generation and stewardship.

This model is akin to other Advisory Boards on the Oregon campus. The University of California, Berkeley, particularly its College of Letters and Science, has developed an approach and a structure for its Advisory Board that has these tenets firmly embedded in its by-laws and could serve as a model for the OBF. Members of the Board should be actively recruited nationally as well as internationally.

We are certain that such an approach would greatly benefit the financial sustainability of the Festival, assist in the recruitment of a new executive director, significantly reduce the frustration of the current Board, enable the Board and University to recruit significant donors, and enable the University to manage the day-to-day functions of the OBF as it does its colleges, schools, institutes and other ancillary and auxiliary enterprises. It would also enable the Executive Director to understand more fully to whom he/she is accountable.

<u>Organizational Structure and Management Reporting</u>

The Charter and by-laws stipulate that the Executive Director and the Artistic Director are to report to the Dean of the College of Music. This is not the practice currently in place.

For the last several years, since the appointment of a new Dean of the School of Music, the Executive Director has reported (de-facto) to the Senior Vice President and Provost of the University, although no formal change in the reporting relationship was made. In addition, the Artistic Director appears to work in collaboration with the Executive Director but has never had a clear reporting relationship with the University. Indeed, a reporting relationship to the Senior Vice President is not likely to be successful, due to the enormous and time-consuming responsibilities of this position on behalf of the University as a whole.

As the Senior Vice President is the chief operating officer of the campus, there is little time for this person to supervise the OBF management as diligently as is needed. The Executive Director's independent and autonomous operating style, while effective and perhaps even necessary in a

situation without regular supervision, is unlikely to be effective with a new Executive Director or for that matter the new Senior Vice President who will assume her position June 1, 2006. This reality will confound the ability of the Board to meet the objectives outlined in this report.

The bottom line is that the Executive Director has little supervision and enormous management freedom. This is further complicated by the fact that the Executive Director's strength is artistic rather than management. As a result, the incumbent who serves as OBF's Director of Development (a misnomer at best) has assumed much day- to-day responsibility for the management of the OBF operations-at the informal behest of the Executive Director as well as on her own. This practice is not in the long term interest of the Festival, and should be addressed by the new Executive Director, assuming the incumbent has extensive arts management experience.

In addition to this situation, there is concern among the OBF staff and Board members about the ineffectiveness of marketing and communications, and the role of the Director of Communications. Interviews with the staff lead one to conclude that the evolving role of one of the artistic administrators from full-time to part-time and the redeployment of assignments and working relationships needs to be addressed as well.

Also, there are a number of part-time positions that have fairly discrete tasks, leaving one to conclude that the organizational structure and reporting relationships of the OBF are highly siloed and function rather independently from one to the other, thereby rendering the organizational structure inadequate to support the long-term viability of the OBF. In addition, unclear delegation of responsibility and authority leads to duplication of effort and lack of clear definition of responsibility within the organization.

Finally, there appears to be ample opportunity to improve dialogue between the position Director of Major Gifts that has a dual reporting role to the University's Office of Development and the OBF, and the OBF Director of Development. It is critical that all persons working on development activities share information openly and in a timely fashion.

Compounding the structural and personnel related issues are the absence of human resource practices in place that support the University's human resource management policies and procedures. For example, up-to-date position descriptions are not available, the table of organization, which we were given, is inaccurate and misleading, and there are no employee performance evaluations on file with the University's human resources operation.

Clearly, these practices are not in the best interests of OBF.

Recommendations

Conduct an organizational study to determine: the appropriate organizational structure of the OBF; staffing levels; reporting structures; position descriptions; and metrics for performance.

Such an organizational study needs to address the role of the Executive Director position, the Executive Director Emeritus position, and the Artistic Director position. A determination needs to be made concerning whether it is more prudent to "buy" some services from other departments of the University or outsource them completely.

The reporting structure of the Festival needs to be addressed as well. We believe that it is inappropriate to assign the Senior Vice President and Provost supervisory responsibility for the OBF, given the multiplicity and complexity of assignments in the incumbent's portfolio,

Rather, we believe that there are three considerations for reporting. As form follows function, if the University perceives that the OBF is an academic activity, the argument could be made to house the OBF within the School of Music. If the OBF is primarily viewed as a public service function of the University, one could argue that the Festival should report to Advancement.

There is yet a third option that calls for the potential clustering of academically oriented, entrepreneurial or ancillary activities such as the Art Museum, the Museum of Natural History, the OBF, and those that are in part self-sustaining to report to a Vice Provost, who would in tum report through academic affairs.

Fundraising and Development

The University has clearly demonstrated its commitment to the OBF through the appointment of a Director of Major Gifts and including the OBF in its current comprehensive campaign. These two critical actions underscore the University's commitment to the future and the sustainability of the Festival, and have resulted in very substantially increased contributions to the Festival. In January of 2006, the Major Gifts Officer provided the Board with several options concerning the creation of Donor Clubs, organizing such clubs on the basis of either annual Festival giving or cumulative giving. Various Situation Strategies have been developed and have been vetted by the Board for their action.

Increasingly, members of the OBF have either contributed or pledged substantial gifts to the OBF Endowment. Presently, there are approximately 4 million dollars pledged to the OBF Endowment Fund with the objective of meeting a 10 million dollar goal by the close of the University's current comprehensive campaign drive. This bodes well in many ways for the future fundraising and development efforts of the Festival.

Frankly, if it were not for this investment in staff resources by the University, we would doubt that the current fundraising efforts shepherded by the OBF staff would have attained such success.

Clearly, the active recruitment of new Friends of the Festival along with the commitment of the Board to engage in more aggressive fundraising and development activities and social events is a positive attribute of the current leadership of the Board. However, we believe that more can be done through the cultivation of foundation and corporate sponsors along with focused sponsored research and grant activity.

Recommendations

We believe that the recommendations previously articulated in this report concerning succession planning, governance and organizational redesign will enable the creation of a solid, on-going foundation for fundraising and development. Key to this success will be the:

- Transformation of the current Board to that of a fundraising/program focused rather than management focused Board.
- The thoughtful transition of the current Executive Director to Executive Director Emeritus status as well as the appointment of a new Executive Director with the ability to maintain the artistic quality of the Festival while improving its financial stability;
- Commitment of the Executive Director Emeritus to fundraising, development and donor cultivation in Eugene and throughout the state, the nation and internationally;

- Integration of all fundraising and development activities through the Major Gifts officer to the Foundation; and

- Design and implementation of an aggressive grants component of Festival operations that takes advantage of the Foundation and Corporate resources available on a national and international scale.

Marketing and Programming

At one time in its history, the Festival had little to no competition from other performing arts organizations. Today, the competitive landscape has completely changed. There are now a number of competitors for both audiences and resources. These include: OFAM; the Eugene Symphony; Oregon Mozart Players; the Eugene Concert Choir; the Eugene Ballet; and the Repertory Theatre. This list excludes Portland-based activities, which are growing in number and quality.

Along with this growing challenge is the paradox of describing the OBF as "world class" when it is positioned locally. Many with whom we talked believe that the marketing efforts of the Festival are inadequate, and the material is staid and does not appeal to younger generations of music aficionados.

Of even more concern are the audience participation rates reported and the trend lines they demonstrate. Many attribute this to a "staleness" of programming as well as the repetitive nature of the Festivals. Others point to the length of the 14-day Festival. Still others articulate the need to run programs year round to targeted audiences. Indeed, many pointed to the innovative ways in which the Spoleto Festival transformed itself into a seven-day Festival with musical programs, master classes, lectures, etc. strategically scheduled on the calendar in difference venues, thereby securing its financial future.

Many are concerned about the funding of new works that are commissioned and the reliance on Maestro Rilling as one of the "primary" draws to the OBF as contrasted with a small cadre of preeminent, younger conductors who are committed to choral and orchestral pieces as well as orchestral pieces in and of themselves. An absence of outreach to the schools was cited as a weakness and several recent donors have earmarked resources for innovative programming for younger audiences.

At the present time, an audience survey is being conducted to inform the work of the Long Range Planning Committee.

Recommendations

The work currently underway by the Long Range Planning Committee of the Board should be reviewed in light of this report to ensure that a rigorous environmental scan has been undertaken to determine the perceived strengths, weaknesses, opportunities and threats facing the Oregon Bach Festival. This should provide the framework for conducting an intentional, strategic marketing campaign. In addition to the review and redesign of the print material currently being undertaken by an outside consulting firm, the website should be recreated, digital means of advertising should be utilized and the use of television and radio further explored to appeal to a younger and new generation of audiences.

The audience survey currently underway should inform the development of an aggressive, proactive marketing campaign. Many of the messages developed in this campaign could prove helpful to annual giving as well as the designation of OBF in planned giving efforts.

Business and Budget Practices

On the surface, the business practices of the Festival office appear weak. Although the Festival is required to comply with University policies and procedures, it does not appear that sufficient management is being provided these functions. Budgeting and personnel management are the two functions which most frequently appear to be managed in a rather informal manner. For example, the Festival frequently overspends its budget, resulting in an operating deficit that has been absorbed by the University's operating budget. The university has indicated that operating deficits can no longer be allowed to accrue.

As we indicated in a previous section of this report, position descriptions are not up-to- date. Neither are there performance evaluations on file in the University Human Resources office for OBF incumbents.

These practices must be corrected.

Recommendations

Undertake a review of the administrative and business practices of the OBF. Rather than utilize the services of a consultant, the University's Office of Resource Management should undertake this review. This office should explore changing the calendar fiscal year to that of the University's in order to provide consistent financial reporting periods.

More importantly, the Office of Resource Management should help design a budget and reporting process that will ensure that the OBF is living within its means. Further, the Office of Resource Management should determine how to maximize the implementation of University policies, processes and procedures in order to ensure that the OBF is in compliance with University reporting and management standards. Wherever possible, administrative processes should be streamlined and financial reporting mechanisms devised so as to keep the Executive Director informed and accountable.

Further, we recommend that the Office of Resource Management undertake an annual subsidy and full cost study of the OBF beginning with the FY 2005-2006 in order to create a baseline for future analysis. This analysis will enable the Board and the OBF staff to understand the degree to which the University currently supports the OBF. This analysis should go a long way to dispelling the "mythologies" that abound the University's level of financial and psychic commitment to the Festival.

NEXT STEPS FOR FURTHER ANALYSIS AND ACTION

The following steps need to be taken in the following order:

1. Ensure the smooth transition of the incumbent Executive Director to Executive Director Emeritus_status. This entails an assessment of the skills and personal attributes required of the new incumbent. Craft a new position description for the search.

2. Conduct an organization study of the Oregon Bach Festival Board that encompasses all the work steps delineated on pages 7 and 8 of this report.

3. In parallel with this review, work with university advancement to transform the role of the current Board into one that is primarily focused on fundraising, development, advocacy, program review, and design. Redraft the Charter and by-laws to reflect this basic transformation.

4. Engage the University's Office of Resource Management to conduct a business practice and process review and a costing study as stipulated in the previous section of this report.

5. Once the new incumbent Executive Director has assumed office, undertake a strategic planning and marketing study that would be partnered by the Executive Director and the Board.

6. The University must clearly define the reporting relationship for the Executive Director.

Listing of Interviews/Meetings

January 10: Interviews

- John Moseley, Senior Vice President & Provost
- Phil Barnhart, Oregon State Representative, Bach Festival Supporter

Meeting

- Bach Festival Board Annual Meeting,

January 11:Interviews

- Marla Lowen, Artistic Administrator, Bach Festival
- George Evano, Director of Communications, Bach Festival
- Michael Anderson, Artistic Administrator, Bach Festival
- Jane Scheidecker, Director of Major Gifts, Bach Festival
- Royce Saltzman, Executive Director, Bach Festival
- Peg Renkert, Director of Development, Bach Festival
- Bob Fraser, President, Bach Festival Board
- Don Tykeson, Tykeson & Associates, Bach Festival Supporter
- Brad Stangeland, Chair Development, Bach Festival
- Susan Price, Chair of Long Range Planning, Bach Festival
- Allan Price, Vice President for University Advancement

January 12: Interviews

- Andy Halpern, Vice President, Oregon Bach Festival
- Marga Larson, Chair Finance Committee, Bach Festival
- Richard Clark, Board Member, Bach Festival
- Betsy Richanbach, Chair Special Projects, Bach Festival
- Andy Berwick, President, Berwick Pacific Corp., Bach Festival Supporter
- Dave Frohnmayer, University President
- Brad Foley, Dean, School of Music
- DeNel Stolz, Development, School of Music
- Don Lutes, American Institute of Architects, Bach Festival Supporter,

April 4: Interviews

- John Moseley, Senior Vice President & Provost and Royce Saltzman, Executive Director OBF
- Allan Price, Vice President, University Advancement
- Peter Moore and Mary-Ann Moore, Campaign Oregon Co-Chairs
- Dave Weinkauf, OBF Board member & CEO of KVAL TV
- Gretchen Pierce, UO Foundation Board Trustee and President, Hult & Associates

Meeting:

- OBF Board Meeting

April 5: Interviews

- Royce Saltzman, Executive Director, OBF
- Robert Fraser, OBF Board President
- Allen Evans, Vice President, Oregon Bach Festival Board
- Tom Ing, OBF Board member & past Chair of the OBF Finance Committee
- Brad Foley, Dean, School of Music
- John Moseley, Senior Vice President and Provost

OREGON AT CALIFORNIA



Kickoff [illegible] TV radio [illegible]

Players to watch [illegible] Enoka Lucas [illegible] Brandon Mebane [illegible]



Complete game preview: Sports, Page B1, or log on to www.registerguard.com

The Register-Guard

Report pans Bach Festival content, marketing



By Bob Keefer
The Register-Guard

When Oregon Bach Festival executive director and co-founder Royce Saltzman announced his coming retirement at a news conference in May, it seemed a natural time for him to step down. At 77, the genial music professor had been running the festival for most of its 36-year history.

But that was only part of the story.

Saltzman's retirement, which will take effect next summer, is part of a much larger re-evaluation of the Oregon Bach Festival that has been quietly taking place this year at the University of Oregon.

The announcement that Saltzman would retire after the 2007 festival came a month after a private consultant hired by the UO to evaluate the Bach Festival called his leadership ineffective and recommended that he step down. The report also called the festival's programming "staid" and said the event has been poorly marketed.

Spurred by former university Vice Pres-

Please turn to BACH, Page A10

Appendix G

'Report pans Bach Festival content, marketing'

By Bob Keefer
The Register-Guard

Published: Saturday, October 7, 2006

When Oregon Bach Festival executive director and co-founder Royce Saltzman announced his coming retirement at a news conference in May, it seemed a natural time for him to step down. At 77, the genial music professor had been running the festival for most of its 36-year history. But that was only part of the story.

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The announcement that Saltzman would retire after the 2007 festival came a month after a private consultant hired by the UO to evaluate the Bach Festival called his leadership ineffective and recommended that he step down. The report also called the festival's programming "staid" and said the event has been poorly marketed.

Spurred by former university Vice President and Provost John Moseley before his own retirement last spring, the UO is trying to take firmer control of the festival. The popular event draws thousands of visitors to Eugene each summer but costs the UO hundreds of thousands of dollars.

"The real issue is money," Moseley said. "It's always money."

The UO operates the Bach Festival through its School of Music, where Saltzman has held the equivalent of a dean's position. The university provides office space for the festival and other services, such as use of Beall Concert Hall for performances and rehearsals.

Between in-kind services and direct financial aid, Moseley said, the 2 1/2 -week festival costs the university $300,000 to $400,000 a year - about half of that in cash, the other half in services. The festival's annual budget is about $1.6 million. The event has long needed the annual subsidy from the UO because ticket sales and other revenue are insufficient to cover the hefty expense of bringing in and housing scores of musicians, including internationally known performers.

Earlier this year, the university spent $25,000 to hire an East Coast consulting firm that specializes in nonprofit organizations to study the Bach Festival's organization, programming and marketing.

Alceste Pappas, head of Pappas Consulting Group Inc. of Stamford, Conn., gave a blunt assessment in a 10-page report delivered to the university in April.

The Bach Festival has functioned for years with little effective oversight from the university, the report says. Its programming has become lackluster, the report suggests, and the festival has done a poor job of attracting a younger audience. Attendance is flat. It was about 15,200 this year, slightly ahead of 2005.

Saltzman, the report concludes, is a great musician but a poor manager.

"The bottom line is that the Executive Director has little supervision and enormous management freedom," the report says. "This is complicated by the fact that the Executive Director's strength is artistic rather than management."

In many arts organizations, an artistic director lays out a creative vision while the executive director is in charge of the nuts-and-bolts business of implementing it; with the Bach Festival, both positions have always been held by musicians.

In an interview, Saltzman said he agreed completely with Pappas' recommendation that he retire, adding that Pappas reached that conclusion, to some degree, at his own suggestion.

"I had been thinking about retirement for quite some time," he said. "When she was here it gave me an opportunity to talk to someone who has been in the business of analyzing arts organizations. I had a great opportunity to talk with her about what would be the best way to make this happen."

Saltzman also agreed with Pappas' assessment of his management skills. "My area is artistic," he said. "Sometimes you have to look in the mirror."

The report strongly criticizes the festival's programming and marketing, pointing to a growing perception of "staleness" in the musical offerings and "the repetitive nature of the festivals."

Saltzman said he didn't disagree with that, either.

"We are doing a lot of soul searching," he said. "After you have been going 35 years or more it is so easy to become stale. ... We have been looking at how we can be more creative and inventive."

Saltzman acknowledged the festival has cost the university money over the years, but he said the university and its students benefit from the event, which has a strong focus on teaching by the world-class musicians it brings to town.

"The marriage of the festival with the university is an enormous plus for the university," he said. The festival, he said, probably can become financially self-sustaining.

"But we have to work very closely with the university to make that happen." he said. "To know where we can go for funding and how we can do it."

The report does not address the eventual retirement of artistic director and co-founder Helmuth Rilling; the 73-year-old German choral director has said he expects to continue working for five to 10 years.

The report also calls for a complete restructuring of the Bach Festival board. Under its 1992 charter, the board approves the festival budget and oversees its management.

Pappas recommends dissolving the board and replacing it with a panel whose primary function would be fundraising.

Linda Brady, who walked into the middle of the situation when she took over Moseley's job as vice president and provost last spring, was circumspect about the delicate process of restructuring the Bach board. "Whenever you move to this kind of transition in a board, questions will be raised," she said.

Current board President Betsy Richanbach is all in favor of the restructuring.

"This was a welcome intervention," she said. "The positive part is, the university in their evaluation process determined how important the Bach Festival is to the university."

But, she notes, the board hasn't yet taken action to dissolve itself.

"There are people who are still questioning what we're doing," she said.

The university is searching for Saltzman's replacement and expects to decide by February.

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The full Pappas report can be found at www .registerguard .com/obfreport.

Meanwhile, the university is awaiting a second report from Pappas, this one on operations at the Jordan Schnitzer Museum of Art at the UO. The report was due in September, Brady said, but Pappas wanted more time to research the museum.

THE PAPPAS REPORT

What: Alceste Pappas, a private consultant hired by the University of Oregon, evaluates operations of the 36-year-old Oregon Bach Festival.

Chief recommendations: Executive director Royce Saltzman's retirement; changing the board of directors' job from governance to fundraising; better marketing of the festival to a younger audience

See the full report: www .registerguard.com/obfreport

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Appendix H

Wrap Press Releases: OBF 2008 – 2014



Oregon Bach Festival Soars Past Sales Mark
July 14, 2008
For immediate release
Contact: George Evano, gevano@uoregon.edu or (541) 346-5667

With a second straight year of sales growth, besting its previous high revenue mark by12%, and staging night after night of sold out concerts, the Oregon Bach Festival enjoyed one of the most successful seasons in its entire history.

As the curtain closed on the St. Matthew Passion on Sunday, July 13, John Evans, OBF President and Executive Director, announced that this year's season grossed $502,696 in ticket sales, exceeding its previous high mark of $448,408 set in 2004, surpassing by 20.2% its 2007 total, and bettering its 2008 budgeted goal by $26,296.

Reflecting an influx of new audiences from the Eugene 08 Olympic Trials and the Festival's opening night venture in Portland, the OBF achieved its broadest ever geographical reach, with ticket-holders from 39 states as well as Australia, Brazil, Canada, Finland, Germany, South Korea, and the U.K. Its total attendance edged 32,300 — one of the highest ever figures in its 39-year history.

Equal to this great achievement, in Evans' view, was the consistently high level of the performances, as witnessed by the extraordinary press the Festival received this year. "The standing ovations, the capacity audiences, and the tremendous collaborative energy of our musicians speak volumes for what the OBF now represents," he reflected, citing the five-minute standing ovation for the opening night B Minor Mass, the crowd-pleasing residency of the Shanghai Quartet (which captured popular imagination in a totally revamped chamber music series), the capacity crowds for Garrison Keillor, The Five Browns, and Sarah Chang, and the profundity of Rilling's closing performance of the St. Matthew Passion.

"Our goal from the outset was to honor the past and the values that have made this Festival great, while celebrating the future and the diversity of programming we can stage and the audience we can attract. And judging by the enthusiasm of our audiences and the press we have received, inspired throughout by music-making of the highest order, we succeeded."

Aside from its music, the OBF honored its past in both the opening and closing nights at the Hult Center, launching the Festival in Eugene with a Founders' Concert honoring its OBF 08 founding fathers, Helmuth Rilling and Royce Saltzman, and preceding the final performance of the St. Matthew with a ceremony in which Rilling presented the Saltzman Award to UO President Dave Frohnmayer and his wife Lynn.

Named in honor of Royce Saltzman, founding executive director (now the Festival's Director Emeritus) the award is the Festival's highest honor, given to those who have made outstanding contributions over the years. The Frohnmayers have been Festival participants since 1971. In recent years Dave Frohnmayer has overseen significant growth in university support for Festival operations.

Evans' view was echoed by Helmuth Rilling, the Festival's artistic director, who hailed both the Festival's high standard of performances and also a new sense of energy emanating from the concert hall on both side of the footlights: 'We have many times performed the great works of Bach, but never, as we have this year, performed all the major pieces in one festival, and at such a very high artistic level. We had many new artists and audiences who had a lot of enthusiasm for our music. This was a real joy for me.'

Concerns that this year's Festival would run concurrently with the US Olympic Trials for ten of its seventeen days were allayed, Evans said, by an overlap in attendance and two key resultant benefits. 'From the start we saw this as an opportunity. Many Trials visitors made their way to the Hult Center, particularly for the concert in which we honored track legend Bill Bowerman, a long-time Oregon Bach Festival supporter. But perhaps of more lasting benefit was the relocation of the opening night to Portland. It re-engaged us with an extraordinarily eager audience and opened a door to Portland that had been closed to us for almost 30 years.'

In addition, Evans said, the OBF's partnership with Eugene 08 also resulted in a beneficial partnership with Nike, which contributed in-kind design of eye-catching festival branding and marketing materials, including the winning new OBF logo.

Evans and Rilling are now eagerly looking forward to the 40th Oregon Bach Festival, which takes place June 26-July 12, 2009. Celebrating four major composer anniversaries (as well as the Festival's own) the scheduled highlights include a program of theatre music by Purcell, Handel's Messiah, Haydn's Creation (in Portland and Eugene), and Mendelssohn's A Midsummer Night's Dream, in a theatrical staging in collaboration with Eugene Ballet. Following the success of this year's chamber music residency by the Shanghai Quartet, there'll be the welcomed return of pianist Jeffrey Kahane as artist-in-residence. Needless to say, the music of J.S. Bach will not be neglected. Rilling's Discovery Series will be devoted to the six cantatas of Bach's Christmas Oratorio and Portland Baroque Orchestra will give a complete cycle of the Brandenburg Concertos, again in Portland and Eugene. The much-anticipated centerpiece will be the world premiere of a new setting of Handel's Messiah text from Swedish composer Sven David Sandström – a joint commission between the OBF and Rilling's Bach Academy in Stuttgart.

OBF by the Numbers
Tickets Sold: 17,488
Total Attendance: ~32,300
Ticket Revenue: $502,696
Number of Events 54
Number of Musicians: 512, from across the U.S., Canada, Europe, Africa, and Asia
Geographic Reach: 39 states, 7 countries
Volunteers (during Festival timeframe): 156
Sponsors and Funding agencies: 62
Program advertisers: 45
Patron table sponsors: 24
Individual donors: 508
Segments taped by Travel Channel Europe 4



Artistic achievements, largest total audience mark 2009 Festival

July 14, 2009
Images: http://www.oregonbachfestival.com/galleries/
Contact: George Evano, Director of Communications (541) 346-5667 gevano@uoregon.edu

EUGENE- Soon after the Oregon Bach Festival Chorus sang the joyous refrains of Hallelujah from the season-ending performance of Messiah, OBF staff, board, and volunteers celebrated as well, with artistic achievements and the successful launch of new ventures leading to the Festival's largest-ever total audience.

Having weathered the economic climate with a manageable drop in ticket revenue, the University of Oregon program is looking ahead to a gala 40th anniversary season in 2010 that will feature the return of singers **Thomas Quasthoff** and **Bobby McFerrin** and expanded presence throughout the state.

"We knew, considering the economy, that we were going to take a few bumps at the gate," said **John Evans**, OBF executive director. "But through partnerships and new outreach programs we were able to connect with more listeners than ever before. We aimed high artistically, and by every measure, achieved our goals."

Those included the addition of a second concert in Portland and one in Bend, and an ensemble-in residence initiative with the **Portland Baroque Orchestra** that led to a sellout in Portland and two highly-attended events in Eugene.

A multi-arts collaboration with the **Eugene Ballet** and **Oregon Shakespeare Festival**, "A Midsummer Nights' Dream," resulted in the season's biggest-selling event. Performances by the taiko-infused **On Ensemble** and tap-dancer **Savion Glover** attracted new, younger audiences. And the July 4 "Red, White and Rhapsody in Blue" was performed for 15,000 at Eugene's **Art and the Vineyard**. Total attendance approached 43,000, largest in the Festival's history.

The most ambitious effort, said Evans, was the co-commission, production, and world premiere of a new version of Messiah by Swedish composer **Sven-David Sandström**, jointly undertaken with the Internationale Bachakedemie Stuttgart and backed by funding from Eugene's Hult Endowment/Oregon Community Foundation and the National Endowment for the Arts. The July 9 performance was met with a spontaneous 12-minute ovation and a deep emotional response from the performers, composer, and conductor **Helmuth Rilling**.

The work was recorded for international broadcast, and will receive additional performances in Europe under Rilling's direction later this year.

Ticket revenue exceeded $439,000, a modest 12.5% dip from the Festival's record setting season in 2008 and a 5% increase from its 2007 revenue.

Evans said the numbers reflect economic factors, with fewer repeat and add-on purchases and a slight decrease in out-of-state visitors. "We had just a 7% decline in the number of ticket-buying households," he noted. "Generally we saw fewer multiple purchases."

He added that sponsorships, individual contributions, and foundation support were strong, positioning the Festival on stable ground for 2010.

"We're in good shape for a solid future," he said, adding that three combined gifts exceeding $465,000, announced the night before the Festival's close, pushed the OBF's Saltzman Endowment to $9.25 million, fast-approaching its goal of $10 million.

The Festival's future includes a star-studded 40th anniversary June 25-July 11, 2010 with an array of music luminaries and major works:

- **Helmuth Rilling**, founding artistic director, returns to lead opening weekend performances of Verdi's Requiem and final concerts of Mendelssohn's Elijah, with both works performed in Eugene and Portland.
- **Thomas Quasthoff**, the bass-baritone who made his American debut at the OBF in 1995, will be artist-in-residence for 10 days. He'll lead a master class, perform a solo recital of Schubert's Die Schoene Mullerin song cycle with pianist **Jeffrey Kahane** in Silva Concert Hall, and sing the title role in both performances of Elijah.
- **Bobby McFerrin**, who sold out 1994 and 2001 OBF concerts, will work and perform with the Stangeland Family Youth Choral Academy.
- **Jamie Bernstein**, daughter of Leonard Bernstein, will host a "Bernstein on Broadway" gala and present her acclaimed Bernstein Beat family programs, which reveal the South American and Cuban influences on her father's music, in both English and Spanish presentations.
- **Monica Huggett** and the Portland Baroque Orchestra return to perform Bach's Orchestral Suites in Ashland, Bend, and Eugene.
- An all-star benefit concert will aim to complete the Saltzman Endowment, led by Helmuth Rilling and featuring Quasthoff, McFerrin, pianists Kahane, **Robert Levin** and **Ya Fei Chuang**, the OBF Chorus and Orchestra, conductor **Anton Armstrong**, and the high-school singers of the Stangeland Family Youth Choral Academy.

A full schedule will be announced and tickets will go on sale in January 2010.

# # #



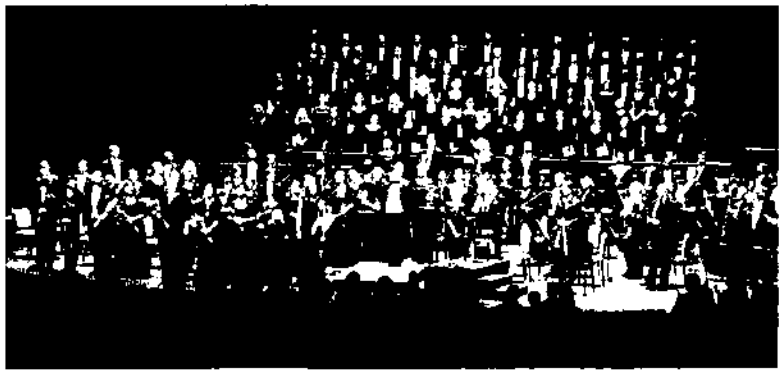
40th Anniversary OBF Reaches Record Heights

For immediate release • July 12, 2010 • Contact: George Evano, Director of Communications

EUGENE-After a three-week musical revelry of concerts and events, the Oregon Bach Festival capped its 40th anniversary celebrations with artistic triumphs, successful new programs, and a box office record.

Finishing its concert schedule with the high drama of Mendelssohn's masterwork *Elijah*, the Festival announced its highest-ever ticket sales of nearly $520,000, an increase of 18% from last summer and eclipsing its previous high, from the Olympic Trials year of 2008, by 3%.

A total audience of more than 41,000 included ticket buyers from 32 states and five countries in Asia, Europe, and North America.



Helmuth Rilling and forces receive a standing ovation following the July 11 performance of Elijah. Photo: Jon Christopher Meyers

Artistic Director **Helmuth Rilling** presided over a 50-event schedule in Portland, Bend, and Eugene that presented 300-plus artists and participants from Russia, Hong Kong, Europe, Israel, Cuba, Canada and virtually every U.S. state.

The record sales mark and diversity of a program that included Bach, Leonard Bernstein, Cuban dance music, and choral masterworks fulfilled the Festival's aim in honoring its past and celebrating its future, said **John Evans**, executive director and president.

"Our goal was to create a Festival as ambitious as possible," said Evans. "We wanted to celebrate, in every way—from education, to performance, to innovation—what we've stood for in our first 40 years. I'm delighted to have exceeded sales beyond expectations. I think it proves that if you are ambitious in programming classical music, the community will come along with you."

Luminaries from the Festival history—including bass-baritone **Thomas Quasthoff**, piano duo **Ya-Fei Chuang** and **Robert Levin**, and period instrument specialists **Monica Huggett** and the **Portland Baroque Orchestra**—were featured extensively.

Jamie Bernstein, Miami-based timba band **Tiempo Libre**, and Oregon's own party orchestra **Pink Martini** attracted big crowds in their Festival debuts.

A last-minute cancellation by pianist-conductor **Jeffrey Kahane** provided unexpected but savory opportunities for artists to shine. **Nicholas McGegan**, who made his OBF debut in 2008, arrived on 24 hours notice to perform in a gala anniversary concert, conducting the orchestra in Poulenc and Mozart, and accompanying Quasthoff for show-stopping Broadway standards. Pianist **Shai Wosner** earned raves for replacing Kahane in back-to-back recital programs.



Bobby McFerrin and Thomas Quasthoff in the July 3 gala. Photo: Jon Christopher Meyers

Soprano **Tamara Wilson** also served as a substitute. She had seven days to prepare as soloist for two performances of the Verdi *Requiem*, delivering what critic James Bash of the *Oregon Music News* called "a jaw-dropping performance," singing with "an electrifying quality that most singers can only dream of" in her first-time performance of the role.

Ambitious new projects included production of a filmed documentary of Rilling's four lecture-concerts of Bach's *B Minor Mass*; the July 3 gala anniversary concert that integrated video tributes with musical numbers involving 200 performers and 10 stage changes; and a sold-out performance by vocalist **Bobby McFerrin** and the Stangeland Family Youth Choral Academy, in which 85 high school singers successfully tackled the complex choral compositions of McFerrin's new CD, VOCAbuLaries.

In Rilling's assessment, riveting performances of major works by Verdi and Mendelssohn were pillars of the Festival's success. "We had many fine performances with the soloists, and chorus and orchestra," said the conductor, the Festival's cofounder. "Particularly Elijah with Thomas Quasthoff, in Portland and also in Eugene. This was music making at the very highest level."

The University of Oregon program achieved organizational milestones as well. Just days before the first concert Evans announced the Festival had reached and surpassed its $10 million endowment. And, a new, major gift from donors Andy and Phyzz Berwick initiated underwriting of the Berwick Chorus of the Oregon Bach Festival.

Within the community, the Festival leveraged grant funds from the James F. and Marion L. Miller Foundation and Oregon Arts Commission to attract hundreds of first-time attenders. Serving audiences in print as well as on stage, the Festival published an English translation of Sara Rilling's 2008 memoir, *Helmuth Rilling, My Father.*

Festival dates for 2011 are June 23-July 10, with a program to be announced in the fall.

# # #



Festival finishes on a high note, announces dates for 2012

July 13, 2011

Contact: George Evano, Director of Communications, 541-346-5667, gevano@uoregon.edu

EUGENE - As Beethoven's Ninth roared to a close on Sunday July 10, the Oregon Bach Festival could look back on a season in which it reached artistic heights, debuted new projects, and set new box office records for ticket sales, total attendance, and geographic reach.

Gate receipts for the University of Oregon program totaled more than $541,000, the third box office record in four years, up 3.7% from 2010, and an increase of more than $100,000 since 2009.

Seven sold-out concerts, the continuation of partnerships with Portland Baroque Orchestra and Eugene's Art and the Vineyard, and an expanded series in Portland propelled the Festival to a new total attendance mark of 44,148, a 40% growth in reach over the last five years.


John Evans, Helmuth Rilling

Sales from the burgeoning, five-event **OBF Portland Mini-Fest** grew by 36% and accounted for 15% of the Festival's ticket revenue. Long a destination for cultural travelers, the Festival attracted audience members from 40 states—its largest number yet —and from eleven countries including China, Australia, Venezuela, Korea, Denmark, England, Canada, Germany, Scotland, Russia, and Lebanon.

John Evans, OBF's executive director and president, attributed the results to a fresh, reinvigorated approach to programming and a stellar lineup of international artists.

"This year's Festival represented a new departure for the OBF," he said, "with a richer and more diverse program and more guest stars than ever before. We're delighted that audiences, old and new, embraced what the OBF now has to offer. We were rewarded by a record-breaking season all round."

"I continue to marvel at the Festival's ability to present timeless music in innovative ways," said University of Oregon President **Richard Lariviere**. "The Oregon Bach Festival is truly of gem of the university, the community and the state."

The Festival's founder and artistic director, **Helmuth Rilling**, led performances of the *Brahms Requiem*, the *Beethoven Ninth*, and four Bach cantatas within the Discovery Series of lecture-concerts.

Superstar cellist **Yo-Yo Ma** launched the Festival with a sold-out opening night performance of Osvaldo Golijov's concerto *Azul*, conducted by **Jeffrey Kahane**. Ensuing concerts featured **Marin Alsop**, **Monica Huggett** and the **Portland Baroque Orchestra**, **Miguel Harth-Bedoya** and his **Caminos del Inka** ensemble, **Maria Guinand** and the **Schola Cantorum de Venezuela**, vocal soloists **Tamara Wilson**, **Rod Gilfry**, and **Robin Johannsen**, pianist **Shai Wosner**, cellist **Alban Gerhardt**, and rising-star conductor **Matthew Halls**.

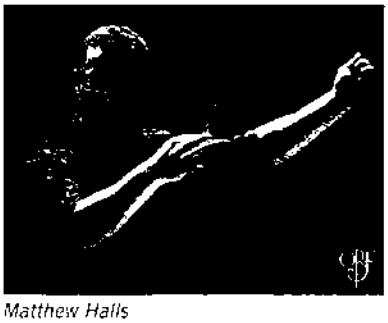

Marin Alsop

A cluster of major concerts reflected the Festival's banner theme *In Praise of Women*:

» **Alsop** premiered a dramatically imagined concert version of Honegger's *Joan of Arc at the Stake* involving three choirs, a hundred-piece orchestra, and actors from the Oregon Shakespeare Festival. Directed by **James Robinson** of Opera Theatre of St. Louis, the new production is slated for future performances with the Baltimore symphony, in Carnegie Hall, Walt Disney Concert Hall, and at London's Barbican.

» Violinist **Huggett** directed her Portland Baroque Orchestra in an NEA-supported tour of Purcell's opera *Dido and Aeneas* in Portland, Bend, Ashland, and Eugene.

» The principal choral conductor within Venezuela's El Sistema public music education program, **Guinand** directed her Schola Cantorum de Venezuela choir in Eugene and Portland concerts and delivered the Festival's annual Hinkle Distinguished Lecture on the topic of *"Music as a Force of Social Change."*



Matthew Halls

» Acclaimed director of the UK's Retrospect Ensemble, now earning accolades as an opera and symphonic conductor in Europe and the US, **Halls** celebrated St. Cecilia in a choral-orchestral program with works by Purcell, Britten, and Handel.

» **Jamie Bernstein** hosted *We Are Women*, a cabaret of her father's Broadway songs.

Chamber music concerts and smaller-scale venues featured interconnected themes and performers. **Gerhardt** performed all of the Bach and Britten cello suites over three nights. **Wosner** appeared with an ensemble of soloists in a Brahms soiree and in solo recital of works by Handel, Knussen, Brahms and Beethoven.

While most Festival high points were onstage, one took place online. Unveiled at the OBF's gala Patron Celebration, the **Digital Bach Project** [http://digitalbach.com] incorporates video, text, audio, and flash animation in a fully interactive experience of Bach's *Mass in B Minor*.

Envisioned and funded by philanthropist Hal Hinkle, the website also serves as the gateway to the Rilling Discovery Lectures and Master Class videos. Filmed during the 2010 OBF, the four hours of high-definition video capture Helmuth Rilling's performance lectures of the *Mass in B Minor*, and an inside look at the conducting master class, the educational core of the Festival for forty years.

"This is a new dimension for audiences and artists, to have, within a few mouse clicks, an unprecedented depth of performance footage and scholarly insight," said Evans. "It will become an international resource for students of Bach and the *Mass in B Minor*."

Evans also announced the concerts to be conducted by Helmuth Rilling at the 2012 Festival.

The maestro will conduct Mendelsschn's *Italian Symphony*, *Violin Concerto*, and *Die Erste Walpurgisnacht* in Portland and Eugene to open the Festival; Bach motets and concertos in the 500-seat Beall Concert Hall; and a season-concluding *St. Matthew Passion* with soloist Thomas Quasthoff, who will also lead a vocal master class and sing a jazz recital.

OBF 2012 dates are June 29-July 15; full programs and artists will be announced in mid-October.

# # #



Festival sets new sales record in most ambitious season

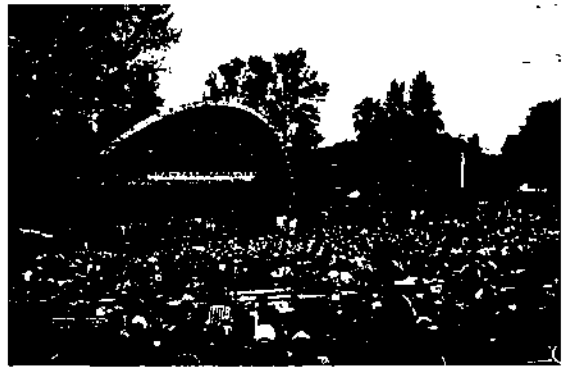
July 15, 2012
Contact: George Evano, Director of Communications, 541.346.5667

EUGENE (Ore)—As **Helmuth Rilling** conducted Bach's monumental **St. Matthew Passion** for an unprecedented twelfth time in Eugene on Sunday, the Oregon Bach Festival celebrated an achievement of its own: the third straight year—and fourth in the last five—of setting box office records.

Opening with two packed concerts in Eugene and Portland featuring violin superstar **Joshua Bell**, through to the dramatic finale, the 2012 edition of the University of Oregon event (June 29-July 15) surpassed $550,000 in total sales, eclipsing last year's mark and racking up twelve sellouts. The most ambitious yet with 65 events in **seven Oregon cities and ten venues**, involving 650 musicians, this year's Festival attracted nearly 18,000 ticket buyers from more than 37 states, and drew a total audience of more than 33,000 from 20 countries.

With the new sales record the Festival has increased its annual ticket sales revenue by more than 25% since 2009.

Concluding its 42nd season, the Festival reached several milestones:



- Its first concert in Eugene's premier outdoor venue, the **Cuthbert Amphitheatre**, featuring renowned party orchestra **Pink Martini.**
- A **high definition video** recording of Rilling's St Matthew Passion lecture concerts, to be streamed online in early 2013
- A multifaceted exploration of Bach's **Goldberg Variations** with sold-out concerts by the **Portland Baroque Orchestra** and **Monica Huggett** and virtuoso pianist **Angela Hewitt**, and the launch of a new Goldberg interactive component on the Festival's digitalbach.com website

- An expanded **OBF Cinema** series that numbered fifteen showings of three different films—two that celebrated the life of enigmatic pianist Glenn Gould, and one presented in partnership with the Eugene's hosting of the Olympic Track and Field Team Trials.
- The presentation of its honorary Saltzman Award to longtime donors and Eugene community leaders **Don and Willie Tykeson.**



British conductor and OBF artistic director designate **Matthew Halls** was in residence for the full span of the Festival. He led the Portland and Eugene premieres (to rave reviews) of the 1944 choral work **A Child of our Time** by Michael Tippett, widely recognized as a modern masterpiece though never performed in Oregon. Halls also performed on harpsichord in a Beall Concert Hall Bach recital, met with an instant standing ovation from a sold out crowd.

Stemming back to 1973, his first performance of the St Matthew Passion in Eugene, Rilling had conducted the work with such luminary soloists as Arleen Auger, Sylvia McNair, Ingeborg Danz, James Taylor, and Thomas Quasthoff. Vocal soloists for the 2012 lecture-concert series and the fully-staged finale were Hanna-Elisabeth Mueller, soprano; Sophie Harmsen, alto; Nicholas Phan and Dann Coakwell, tenor; and Tyler Duncan and Markus Eiche, bass.

In his penultimate season as the founding artistic leader, Rilling was on the podium for nine concerts, including five of the season's sellouts.

"This was a true celebration of Helmuth's legacy," said **John Evans**, OBF executive director, "through Bach's works, of course, but also through his spirit—a great, festive atmosphere nourished by Helmuth's leadership and the participation of world-class musicians, dedicated donors and volunteers, and our audiences, many of whom travel the globe each year for the OBF experience."

The 2013 OBF takes place June 28-July 14. Marking Maestro Rilling's 80th birthday and his retirement as the OBF's artistic director, the Festival will be anchored by Beethoven's **Missa Solemnis** and two Bach masterworks: the **St. John Passion** and **B Minor Mass.**

An index of reviews and photos from the 2012 Festival are online at www.oregonbachfestival.com.

# # #

OREGON BACH FESTIVAL 2013






Ovations, Honors Conclude Rilling Era

July 15, 2013
Contact: George Evano, Director of Communications, 541.346.5667

EUGENE—With a packed house in Silva Hall for Sunday's performance of Bach's B Minor Mass, the Oregon Bach Festival and Eugene community concluded an era of artistic leadership—the final concert of conductor Helmuth Rilling's forty four-year tenure as founding artistic director of the University of Oregon event.

In ceremonies following the concert, two thousand audience members in the Hult Center lobby raised a glass in salute as John Evans, OBF president and executive director, announced a new funding initiative in Rilling's name, focused on education.

"From a longtime professional conductor's master class, to an annual program for advanced high school choral singers, to an array of seminars, lectures, and even online programs geared to lifelong enrichment through music," Evans said, "Helmuth's greatest legacy is his commitment to education. In accord with our standing as a program of the University of Oregon, this new endowment will continue that legacy."



State representative Phil Barnhart honored Rilling with a resolution from the State of Oregon, proclaiming the conductor's contributions to the cultural life of the state.

Evans then presented the maestro with a hand-bound score of the musical work "Alleluia" by Scottish composer James MacMillan, written in Rilling's honor and premiered on July 6 during the Festival's "Passing of the Baton" concert.

At a small reception later in the evening, UO President Michael Gottfredsen presented Rilling with his third honor from the University of Oregon, its Presidential Medal.

"Each in its own way memorializes the very best in human endeavor," said President Gottfredson. "Tonight, you [Maestro Rilling] become the first person in the history of our university to have been honored with all three of these awards."



The honors capped a year in which Rilling celebrated his 80th birthday and received Chorus America's Distinguished Service Award and the Eugene's Arts and Letters Award.

The Festival's entire season was a success as well, with critical raves, thirty concerts that included five sellouts, and a total audience of nearly 30,000 that attended fifty-eight events in six cities, including concerts, lectures, talks, films, family programs, and social events.

Participants came from more than thirty-nine states and seven countries including Canada, Germany, Venezuela, and Thailand.

Evans said another key accomplishment in this milestone year was the transition of leadership from Rilling to new artistic director Matthew Halls.

Halls performed as a soloist with Portland Baroque Orchestra in a tour of four cities and conducted two Silva Hall concerts, including the second half of the "Passing of the Baton" event.



That night, he conducted the OBF's Berwick Chorus in the world premiere of MacMillan's Alleluia to an instant standing ovation, with Helmuth and Martina Rilling seated on stage.

"This was a momentous season in many ways," Evans said. "We could see, in both literal and symbolic fashion, the successful transition of leadership to a new era with Matthew Halls. And, especially through this final concert, we were all able to celebrate what Helmuth Rilling has brought to our Festival and this community."

Festival dates for 2014 are June 27-July 13. Major concerts for Halls' first year as artistic director will be announced in early September.

# # #

OREGON BACH FESTIVAL

For More Information Contact: April Libman, Director of Marketing and Communications, at 541-346-5667

OREGON BACH FESTIVAL 2014

Conductor and Artistic Director Matthew Halls' Inaugural Festival Programs Distinguished by Rave Reviews, Standing Ovations, Musical Accomplishments and Community Support

Eugene, OR – July 21, 2014. There was no question that the next generation had indeed arrived when Oregon Bach Festival's Artistic Director and Conductor, Matthew Halls, delighted both critics and audiences with innovative repertoire, traditional masterpieces and introduced an eclectic range of programming during his inaugural year leading the 45-year-old summer event.

This year's festival, which was held in both Eugene and Portland from June 26th through July 23rd, 2014, boasted 27 musical performances, 10 educational programs, eleven community outreach events and six children's concerts, entertaining visitors from 39 U.S. States, 8 foreign countries, and reaching nearly 20,000 total audience members. Festival performance highlights included Monteverdi's Vespers of 1610, the world premiere of Halls' new reconstruction of Bach's St. Mark Passion, Festival founder Helmuth Rilling conducting Mozart's Requiem, Rachmaninoff's All-Night Vigil, and the festival finale performance of the Verdi Requiem. High points were also OBF's first Organ Institute education program and recital and, on the lighter side, the much anticipated return of Canadian Brass and a tribute to Duke Ellington. Festival President and General Director, John Evans remarked,
"The sheer diversity and artistic excellence of the season was breathtaking, and promises even greater things ahead during Halls' tenure as our Artistic Director; a very auspicious debut season indeed!"



Performed twice, once in the University of Oregon's Beall Hall, and once at Trinity Episcopal Church in Portland, the reconstruction of St. Mark Passion featured the Oregon Bach Festival Orchestra and soloists Yulia Van Doren (soprano), Reginald Mobley (countertenor), Nicholas Phan (tenor), Dashon Burton (bass) and Tyler Duncan (bass). This work, a collaboration between Matthew Halls and Dominik Sackmann (head of musical interpretation research in the Department of Music at Zurich University), was based on an existing libretto for a Good Friday Passion by J.S. Bach, although the musical setting has long been lost. A complex artistic endeavor, the reconstruction of St. Mark Passion, was the focus of a Hinkle Seminar, and subsequently greeted with excitement by festivalgoers, who were intrigued, captivated and delighted by its presentation.

In his first appearance as a Guest Conductor, Emeritus Director Helmuth Rilling returned to the Oregon Bach Festival to conduct two of Mozart's late and most significant works in Silva Concert Hall: Symphony no. 40 in G Minor (K. 500) and Requiem (K. 626). The sell-out show featured the Berwick Chorus and the OBF Symphony Orchestra, and a stellar line-up of soloists, Tamara Wilson (soprano), Jamie Barton (mezzo-soprano), Nicholas Phan (tenor) and Shenyang (bass).

Voted Festival Favorite by audiences on Facebook, Canadian Brass played upbeat selections from a broad range of composers including Bach, Brahms, Schumann, Fats Waller, Paul McCartney and John Lennon. The band's lighthearted musical style, on-stage banter, and riotous finale (a condensed, comical rendition of the opera Carmen, complete with powdered wigs and velvet costumes) wowed audiences, who often found themselves laughing, cheering and interacting with the performers throughout the show. Canadian Brass also performed during the Festival's Gala Celebration Fundraiser on Sunday, June 29.

Oregon Bach Festival's closing performance, the Verdi Requiem (the Latin Mass for the Dead), was a larger-than-life, star-studded, spectacular performance featuring solos by Tamara Wilson (soprano), Jamie Barton (mezzo-soprano), Russell Thomas (tenor) and Shenyang (bass), a choir of 168 (comprised of the Berwick Chorus, Stangeland Family Youth Choral Academy, and University of Oregon Chamber Choir) and the 84-member OBF orchestra, all conducted by the charismatic Matthew Halls. First and foremost a composer of operas, the Requiem is one of only two major works Verdi wrote during his hiatus from opera, and has sometimes been criticized for its theatrical qualities. However, it was that same theatricality, passion, and arresting musicality that moved some audience members to tears, and caused others to stand and shout, "Bravo," as this stunning festival finale concluded.

As Evans commented, "Matthew's first season was framed by two masterpieces, both penned my men of the theatre: Monteverdi's Vespers, and Verdi's Requiem. Both performances demonstrated Halls' scrupulous attention to detail, his profound musicality, and his sense of drama through music. The visceral and emotional impact of Hall's reading of the Verdi on closing night would be impossible to exaggerate. The OBF audience and, indeed, the artists themselves, were overwhelmed by the extraordinary beauty and sheer force of the performance!"

Aside from the Hinkle Seminar and Lecture, led by moderator Hal Hinkle with Matthew Halls and Dominik Sackmann (Reconstruction of the St. Mark Passion) and Helmuth Rilling (Reflections on a Life Devoted to J.S. Bach), educational hallmarks of 2014 also included the Composer's Symposium and concerts, the Organ Institute Recital (led by program director and Grammy-Award winner, Paul Jacobs),

the Master Class Conductor's Showcase Concert, and the four-part Discovery Series that examined Bach's Easter and Ascension Oratorios, as well as Bach Cantatas BWV 4 and BWV 172. Children's programming included a workshop by Canadian Brass and two multi-media performances of Sleeping Beauty, with storyteller David Gonzalez, who remixed the tale in rhymed verse. Free programs for the Eugene Community included performances by the Oregon Brass Society, PICCFEST Children's Chorus, British Columbia Girls' Choir, Stangeland Family Youth Choral Academy Soloists and solo marimba music by the University of Oregon's School of Music professor, Pius Cheung.

According to Evans, *"education has always been, and will always be, at the heart of the OBF, which, after all, is a very significant international program of the University of Oregon. We are proud to be a 'jewel in the crown' of the UO's international educational mission."*

Next year's Oregon Bach Festival will take place from June 26th to July 12th, 2015 and promises the continuation of world-class choral and orchestral performances, new educational opportunities and community outreach endeavors.

****

The Oregon Bach Festival, a landmark program of The University of Oregon, has presented the masterworks of J.S. Bach to audiences in Eugene, Portland, and throughout the State of Oregon, for more than four decades. The annual event originally started as a modest collaboration between German Conductor and Organist, Helmuth Rilling and once Associate Dean of the University of Oregon School of Music, Royce Saltzman. The OBF is now an international festival of worldwide repute, led by Maestro Matthew Halls (Artistic Director) and Dr. John Evans (President & General Director). In additional to traditional choral-orchestral masterworks, the festival also presents internationally renowned artists such as Yo-Yo Ma, Midori, Pink Martini and Joshua Bell; offers educational programs in the format of lectures, symposiums and master classes; children's and family programming; and, free community programs. Writers from *The Times* of London, the *Los Angeles Times*, and the *Wall Street Journal* have praised the Festival for its *"pioneering approach to programming"*, describing it as *"virtually without equal in America"* and *"one of the world's leading music festivals."* The Festival is supported through public and private grants from the National Endowment for the Arts, Hinkle Charitable Foundation, Oregon Arts Commission, Oregon Cultural Trust, the Paul G. Allen Family Foundation, the James F. and Marion L. Miller Foundation; and both the Silva Endowment and the Nils and Jewel Hult Endowment of the Arts Foundation of Western Oregon through the Oregon Community Foundation, and substantially from corporate sector, including American Airlines, Bigfoot/Pepsi-Cola, KeyBank, Umpqua Bank, US Bank, Valley River Inn, and Wildish Companies.



UNIVERSITY OF OREGON

Appendix I

Oregon Bach Festival receives largest-ever gift

Berwicks launch new HIP orchestra with gift of $7.25 million



Andrew and Phyllis Berwick with OBF President & General Director, Dr. John Evans

EUGENE, Ore. - (May 17, 2014) – Thanks to a $7.25 million gift from University of Oregon alumni Phyllis and Andrew Berwick, the Oregon Bach Festival will soon boast an orchestral training and touring program that will be one of the first of its kind in the country.

Scheduled to launch in summer 2015, the Berwick Academy will be dedicated to historically informed performance practice of music from the 17th to the 19th centuries, open by audition to young professional musicians.

By far the largest single contribution in the festival's 45-year history, the gift enables the academy to be tuition-free, essentially removing all barriers for talented young artists to pursue their passion.

Through its combination of immersive training, stellar faculty, and a concert tour—all at virtually no cost to participants—the university and festival foresee the Berwick Academy becoming the nation's premier destination for aspiring musicians serious about historically informed performance (known as HIP).

The Berwicks met as UO students in the 1950s and have been involved and engaged as long-time, significant donors and volunteer leaders for both the university and the Oregon Bach Festival.

John Evans, OBF's president and general director, announced the gift on Friday, May 16, in Portland, when UO President Michael Gottfredson presented the Berwicks with the university's prestigious Pioneer Award.

'We really wanted to give a significant gift to the University of Oregon and the Oregon Bach Festival,' Andrew Berwick said. 'This is a great festival, better than almost any in the world.'

'I think the Berwick Academy will set the stage for young musicians to enhance what they've already learned in their conservatory,' said Phyllis. 'It will give them a deeper understanding of where all this began, especially with Bach.'

'The Berwicks' contributions to this university are simply astounding,' said President Gottfredson. 'The Oregon Bach Festival and the university are incredibly lucky to count them among our friends and trusted advisors.'

'Phyzz and Andy, thank you from the bottom of my heart,' said Evans, acknowledging that the value and impact of the Berwick's gift will set this new program apart.

'This is an incredibly generous gift by two truly amazing people. It affirms the Oregon Bach Festival and the University of Oregon as a destination for one-of-a-kind, life-changing experiences.'

'And, true to the Berwicks' character for doing things right, it's a commitment of sufficient resources to ensure the highest caliber of education and performance from the start.'

While historically informed performance has long been the standard in Europe, few specialized training opportunities exist in the United States—a need that led the Berwicks to endow the program.

In 2015 Berwick Academy participants will train over a three-week period with OBF's new artistic director, Matthew Halls, guest director Masaaki Suzuki (founder/director of the Bach Collegium Japan) and faculty and guest artists led by Monica Huggett (The Juilliard School) and Robert Levin (Harvard University).

An ensuing six-concert tour in Eugene, Florence and Portland will bring the repertoire—and the festival name—to new audiences, with plans in the future to extend the touring coast to coast.

The Berwick Academy is modeled on the European Union Baroque Orchestra, an important early-music training program founded in 1985. Matthew Halls, whose period-instrument recordings have received major acclaim, is a EUBO graduate and now a EUBO trustee.

About the Berwicks

Andy Berwick is a real estate developer and founder of Berwick Pacific Corporation in San Mateo, Calif. Phyllis Berwick is a former teacher.

The Berwicks established the university's Richard C. Williams Endowed Student Leadership Fund in 2004, which combines the academic theory of leadership with skills gained from working inside and outside of the classroom.

The Berwicks, who have long been involved with the San Francisco Symphony, attended their first Oregon Bach Festival concert in 2004. They have been significant donors to the Oregon Bach Festival since 2005, and they served as co-chairs for the final phase of OBF's $10 million Saltzman Endowment campaign, making a leadership gift of $1.7 million, thus endowing the festival's professional chorus, now called the Berwick Chorus of the Oregon Bach Festival.

In 2010, they received the festival's highest honor, the Saltzman Award, "presented only to individuals who have shown exceptionally high levels of leadership and commitment to help the festival achieve its mission."

'Phyzz and Andy have a special place at the heart of the university and the OBF,' said Evans. 'Without their philanthropy, leadership, and encouragement, the Oregon Bach Festival would not be anywhere near the organization it is today.'

The Berwick Academy's first auditions take place in autumn 2014.

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Appendix J: Oregon Bach Festival: Marketing Communications Plan

April Libman, Director of Marketing and Communications: September 2014

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Executive Summary

Situation Analysis

"I was obliged to be industrious. Whoever is equally industrious will succeed equally well"

Johann Sebastian Bach

Battered by the great recession in 2008, arts organizations have shown resilience after facing what was the worst economic downturn in generations by continuing to evolve and maintain their social relevance.

Despite this, many organizations, especially those that perform and present classical music, still face complex challenges that threaten their overall growth and sustainability. Broadly, these include demographic changes in the overall U.S. population, decreased consumer spending on leisure activities, how current and potential audiences consume and experience classical music, the definitional boundaries surrounding classical music, media fragmentation and the serious decline in art's education which ultimately serves as the foundation for attendance in adulthood. The League of American Orchestras *(Audience Demographic Research Review)* noted that if these trends remain unaddressed, the audience for live, classical music could decline by an additional two to seven million people, or 14% by the year 2018.

While the live classical music market continues to evolve, so too does the Oregon Bach Festival. Since the year 2007, the Festival has undergone several significant changes: both its Artistic Director (Helmuth Rilling) and its Executive Director (Royce Saltzman) retired and were replaced with new leaders Matthew Halls (Artistic Director) and Dr. John Evans (President & General Director), respectively; new Directors of Development and Marketing were hired; new educational initiatives (the Digital Bach Project, The Organ Institute, Vocal Fellows Program, Berwick Academy) and artistic programs (Chamber Music at Beall) added; and, the Festival has continued to expand its reach to audiences in Portland and around the State of Oregon. Additionally, the New Artistic Director, Matthew Halls has begun to incorporate his vision of using period instruments to authenticate the masterpieces performed during the Festival. During a decade rife with downturns in attendance, participation and funding, these changes are alternately courageous and concerning.

Both changing external and internal landscapes mandate an aggressive approach to achieving sustainability and growth for the Oregon Bach Festival now and in the future. It must continue to engage new and current audiences, increase participation, and attract funding with vibrant and innovative artistic programming, relevant marketing campaigns and compelling fundraising appeals. It must counter industry trends by adopting new tactics, and adapt to a new consumer environment by accommodating its preferences. Business can no longer be done "as usual," and instead must be carefully planned and executed against the nature of the changes in the marketplace. In the short term, this will mean taking considered risks to find common ground, and in the long term, making adjustments as necessary to remain on a positive trajectory.

With staff from the Oregon Bach Festival now in the throes of planning for 2015, this plan will attempt to inform its artistic, educational and community programming by summarizing the current market, charting industry trends, reviewing the competitive environment, defining the audience for live classical music, reporting audience preferences and predispositions and reviewing the historical purchasing behavior of its patrons. As important, by better understanding these variables, the Oregon Bach Festival can more successfully market to emerging and existing audiences, ultimately guaranteeing its long term sustainability, growth and success.

Oregon Bach Festival – Mission

'The Oregon Bach Festival inspires the human spirit through the art of music. As a program of the University of Oregon, the Festival provides the highest level of performances and innovative educational opportunities, involving a broad-based community of musicians, audiences and donors in a manner that assures the long-term sustainability of the event.'

The Organization

The Oregon Bach Festival is an annual celebration of the works and legacy of composer Johann Sebastian Bach, held in Eugene, Oregon every late June through mid-July. The Artistic Director Matthew Halls is a British harpsichordist, organist and prolific conductor. President & General Director, Dr. John Evans, is formerly from the BBC in London, where he served as Director of Music Programming.

The Festival's programming is multi-dimensional and well-known for commissions and premiers. It presents a diverse range of concerts, including a focus on choral orchestral works; chamber music ensembles; collaborations (Eugene Ballet, Oregon Shakespeare Festival and Portland Baroque Orchestra); guest artists (which, in recent years have included American Storyteller, Garrison Keillor, Bobby McFerrin, Savion Glover and renowned cellist Yo Yo Ma); children's programming; and, community outreach events in the form of free concerts.

The Oregon Bach Festival's extensive educational opportunities include master classes in conducting, the Composer's Symposium, the Discovery Lecture Series, the Digital Bach Project (an interactive learning tool), the Organ Institute, the Vocal Fellows Program, the Choral Teachers Workshop, the Stangeland Family Youth Choral Academy for high school singers (directed by Anton Armstrong of St. Olaf College) and its newest venture, a historically-informed performance program, the Berwick Academy, available tuition-free to students and young professionals.

What the *Wall Street Journal* has called one of the "world's leading music festivals," the Oregon Bach Festival was founded in 1970 by German Organist and Conductor, Helmuth Rilling and former Associate Dean of the University of Oregon's School of Music, and President of the American Choral Director's Association, Royce Saltzman. Begun initially as a series of classes and concerts at the University, by the late 1970's, the event had expanded to include full-scale choral orchestral performances, and moved beyond the boundaries of an all-Bach repertoire.

As an outgrowth of the University of Oregon's School of Music, the Festival was originally housed at the school's Beall Concert Hall. With the opening of the Hult Center for the Performing Arts in 1983, the Festival was able to program more and much larger classical masterpieces, as well as expand the number of other programs, thus attracting national and international musicians and artists of the highest possible caliber. Today, the Oregon Bach Festival still performs in these two venues, but has added others in Eugene, as well as in other parts of the state (Portland, Bend, Newport, Corvallis, Florence, Lincoln City and Ashland).

Since its inception, the Oregon Bach Festival has made significant contributions to both the world, as well as the local music scene. Some of its accomplishments over its distinguished 45-year past:

- The Discovery Series that Helmuth Rilling developed in Eugene (involving the master class program, lecture-demonstrations and concerts) ultimately became the model for the Internationale Bachakademie Stuttgart, which he founded in 1981, as well as subsequent Bach academies he's led in Eastern Europe, South America and Asia.

- Festival concerts have reached worldwide audiences through broadcasts of on National Public Radio, American Public Radio, Voice of America and the European Broadcasting Union.

- During the 300th year anniversary of Bach's birth in 1985, the Oregon Bach Festival performed St. John Passion, St. Matthew Passion, B-Minor Mass and all 6 of the Brandenburg Concertos, culminating in an appearance at Los Angeles, California's Hollywood Bowl.

- The festival won a 2001 Grammy Award for Best Choral Recording with its performance of Penderecki's *Credo*.

- The Oregon Bach Festival was introduced to thousands of visitors to Eugene when it took an active part in the Olympic Trials hosted by the University of Oregon at Hayward Field in both 2008 and 2012. In 2008, the festival dispatched the Stangeland Family Youth Choral Academy to sing the American National Anthem at the opening ceremony, and performed four, free, musical concerts on the stage at Hayward Field. In 2012, the Festival honored the upcoming Olympic Games in London by paying tribute to British composer, Michael Tippett, with his Bach-inspired, "Child of our Time."

- In 2011, the festival launched the Digital Bach Project, a global initiative to extend the reach of the festival, which invites web site viewers to experience an interactive exploration of Bach; it's one of the first such innovations in the world.

With continued support from the University of Oregon, the Festival has grown and so has funding from other public and private supporters like KeyBank, Bigfoot/Pepsi-Cola, the Wildish Companies, Valley River Inn, National Endowment for the Arts, Oregon Arts Commission, Oregon Cultural Trust, Paul G. Allen Family Foundation, James F. and Marion L. Miller Foundation; and both the Silva Endowment and the Nils and Jewel Hult Endowment of the Arts Foundation of Western Oregon through the Oregon Community Foundation.

Important individual contributions have come from thousands. In particular, the Scharpf Family and Bill Bowerman, who helped sustain artistic funding during a critical financial time in the early 1980s; and, J. Peter and Mary Ann Moore, as well as Andrew and Phyllis Berwick, who contributed significantly to the $10 million Saltzman Endowment, set up to assure the long-term stability of the Oregon Bach Festival.

With the 2015 Festival approaching, and the 50th Anniversary of the Oregon Bach Festival not long off, the annual event stands ready to prosper with a new, young and innovative Artistic Director, full complement of artistic and administrative staff, enhanced educational programs, and the continuation of musical programming which has become known as, "virtually without equal in America (*LA Times*)."

The Products

Artistic

Oregon Bach Festival

The 2014 Oregon Bach Festival was significantly larger than ever before: there were a greater number of festival concerts, a greater number of concerts by guest artists, performances took place in a larger number of geographic locations, the total number of PICCFest concerts increased markedly, and the Organ Institute was introduced with a corresponding increase in classes and concerts. In total, the 18-day Festival, which took place from June 26th through July 13th, hosted:

- 61 total events
- 43 paid events, in eleven different venues, with a total of 34,575 saleable seats
- 18 free community events
- 3 children's events
- 7 large-scale choral orchestral performances (Monteverdi, St. Mark, Mozart Requiem, Rachmaninoff All Night Vigil and Verdi)
- 14 public educational opportunities (Inside Line, Hinkle Lectures, Discovery Series, and Let's Talk Q and A sessions)
- 11 concerts in conjunction with private educational programs SFYCA, Conductors Symposium and the Organ Institute
- 2 collaborations, representing seven shows in Portland, Eugene, Newport, Corvallis and Florence (Portland Baroque Orchestra and Eugene Ballet)
- Concerts, lectures or lecture-performances in 12 different venues (Silva Concert Hall, Soreng Theater, Hult Lobby, Beall Concert Hall, The Studio, First United Methodist Church, Trinity Episcopal Church, the Newmark Theater, Central Lutheran Church, LaSells Stewart Center, Newport Performing Arts Center and the Florence Events Center)
- 400 + guest artists, musicians and vocalists from the United States and beyond
- One large gala event
- Numerous other receptions, lunches, dinners and other fundraising-related events
- 20,000 + attendees from Oregon and beyond

ChamberMusic@Beall

In Fall 2014 and Spring 2015, the Oregon Bach Festival, in collaboration with the University of Oregon School of Music and Dance, will present the Chamber Music Series at Beall Concert Hall. Originally presented solely by the University, Dr. John Evans affected the collaboration in 2008, bringing ChamberMusic@Beall under the Bach Festival's umbrella as a means to augment the summer event with additional programming during its hiatuses. The series brings visiting artists of international stature to Eugene.

While the University's School of Music still retains budgetary responsibility for the series, Oregon Bach Festival staff is primarily responsible for programming, marketing and identifying sponsors for the Chamber Music Series.

This year's event, which begins on October 12th, 2014 and runs through April 2015, will feature six concerts of traditional and innovative music by soloists, ensembles and string quartets of international standing. The roster includes The Emerson String Quartet, Trio Con Brio Copenhagen, Pianist Shai Wosner, Violinist Stefan Jackiw, Calder String Quartet and the Cantus Vocal Ensemble.

There are an estimated 180 subscribers to the Chamber Music series who will get the first chance to buy season tickets, with the excess inventory of seats sold to single ticket buyers on a first-come, first-served basis. While not routinely sold-out, series shows are well attended and have a high level of awareness in the community.

Educational

Master Classes in Conducting

The oldest educational program offered by the Oregon Bach Festival, this Master Class offers advanced training in choral orchestral conducting, and has served more than 1200 students from around the world since its inception.

In 2014, Matthew Halls expanded the curriculum and opportunities offered to master class students by inviting both Helmuth Rilling (Director Emeritus) and newly-named Program Director Edward Maclary (Director of Choral Activities at the University of Maryland) to join him in giving students an enhanced educational experience

This past year's master class offered aspiring conductors the chance to assist Maestro Halls in the rehearsal process for a major Festival program, conduct concerts that focus on both historical and contemporary performance styles, attend additional classes on technique and repertoire, conduct musical repertoire for the Discovery Lecture Series and intimately observe the preparation and rehearsal of Halls' reconstruction of Bach's St. Mark.

Prospective students are encouraged to audition for the Master Class, and come from around the globe to participate.

Composer's Symposium

The Composer's Symposium, which is offered every other year by the University of Oregon's School of Music and Dance, and embraced by the Oregon Festival, celebrated its 12th season in 2014. Emerging composers, conductors and performers gather in Eugene to collaborate, network and participate in numerous concerts featuring vocal and instrumental premieres by the group. In 2014, the Composer's Symposium, through its "New Soundings Series," performed 30 new works, was directed by Robert Kyr, and was also led by composer-in-residence, Chen Yi, and Artists-in-residence Craig Hella Johnson, Duo Damiana and the Fear No Evil ensemble.

Stangeland Family Youth Choral Academy

An intensive, two-week summer program, the SFYCA is open by audition to high school vocalists that want to become better singers. Conductor Anton Armstrong, of St. Olaf College, leads a group of 80+ students who get unique training that culminates with several opportunities to perform in festival concerts, meet professional musicians and attend festival events.

In 2014, the Stangeland Family Youth Choral Academy performed a concert of their own in Eugene, another in Portland and sang with professional soloists, choirs, and musicians, and Conductor Matthew Halls at the Festival's closing night concert, the Verdi Requiem.

Choral Teachers Workshop

The Choral Teachers Workshop is a four-day, professional development program for a limited number of high school choral directors. The program, which takes place during the Festival in Eugene, is directed by Sharon J. Paul. Through in-depth seminars and workshops, as well as observing the Stangeland Family

Youth Choral Academy, the program helps professionals study scores and develops more effective rehearsal techniques, as well as reinforces a range of workshop topics to take back to their own school choruses.

The Organ Institute

Established in 2014, the Organ Institute offers both student and professional organists the opportunity to immerse themselves in the works of J.S. Bach and other notable composers of the same period, as well as exploring musical technique and interpretation through specialized seminars, master classes and performances. The Oregon Bach Festival Organ Institute is directed by Grammy Award-winning organist, and Juilliard Professor, Paul Jacobs.

The Berwick Academy

Oregon Bach Festival will launch the new Berwick Academy, an orchestral academy that focuses on historically-informed performances of early music, during its annual 2015 season. The Academy, open by audition to students and young professionals, will be led by Maestro Halls and Guest Director, Masaaki Suzuki, and a faculty led by Portland Baroque Orchestra's Artistic Director, Monica Huggett, who is also the Artistic Director of Juilliard's Early Music Program. The first of its kind in America, the Berwick Academy's inaugural class will provide the chance to learn both classical and baroque repertoire, and perform programs in both Eugene and Portland during the summer event.

Community Opportunities

Hinkle Distinguished Lectures and Seminars

Hal Hinkle, a graduate of the Oregon Bach Festival's master class in conducting, subsidized the Hinkle Lecture Series through an endowment from the Hal Hinkle Foundation. A tribute to what he had learned during his time at the Oregon Bach Festival, the Hinkle Lectures were developed as a free educational tool that helps audience members continue their musical education. By attending, each comes to better understand the underpinnings of major works performed during the festival.

Inside Line

Another free lecture opportunity given to Oregon Bach Festival patrons that takes place directly before a major work is presented. Inside Lines are formatted to give audiences a glimpse into the history of the masterpiece, and its relevance to audiences today.

Let's Talk

Presented free to community audiences who are interested in getting to know festival guests (soloists, performers, collaborators, program directors) through question and answer sessions that allow them to discuss related concerts, programs and collaborations. In 2014, this list included organist, Paul Jacobs, choreographer and Artistic Director, Toni Pimble, soloist Tamara Wilson and artistic guests Jamie Bernstein and Michael Barrett. Let's Talk sessions are moderated by Fred Crafts, Eugene's "Ambassador for the Arts."

On The House

Presented in the Hult Center Lobby, or another Festival venue, in 2014, these free public performances included PICCFEST choruses, the Oregon Brass Society, Pius Cheng, the Composer's Symposium American Creator's Ensemble and Organ Interludes.

The Market

Current Size and Definition

The Nation

According to a 2010 national study on *Arts and Economic Prosperity* done by Americans for the Arts, the arts and culture industry generated $135.2 billion of economic activity: $61 billion by the nation's non-profit arts and culture organizations, plus $74.1 billion in spending by their audiences. This economic activity supports 4.13 million full-time jobs, and generates $86.6 billion in residential household income. The arts and culture industry also generates $22.3 billion in revenue to local, state and federal governments each year, a yield far beyond its $4 billion dollars in government allocations and subsidies.

Nationally, the average arts attendee spends $24.60 (in addition to the price of admission) when they see an arts and culture attraction or event. These audiences funnel an estimated $74.1 billion of revenue to local merchants and their communities. Non-local tourists spend twice as much ($39.96 versus $17.42) to see an arts event than do local attendees, demonstrating that when an organization attracts cultural tourists, it harnesses significant rewards.

The State

The State of Oregon's 2010 population was 3.83 million, making it the 27th most populated U.S. state. According to the Oregon Cultural Trust, its 1,326 eligible non-profit arts and cultural institutions generated an estimated $580.5 million in sales, and employed 19,000 people, who received $272.8 million in income. The total economic impact on Oregon communities associated with arts and culture amount to $1.2 billion dollars in sales, including $470 million in overall revenue and an additional 14,900 jobs. Total employment of arts and culture workers in the state is ranked 13th in the nation. Twenty two percent of all arts and culture organizations in Oregon focus on the performing arts. Collectively they represent $119.3 million in revenue, and contribute 2259 jobs. According to the National Endowment for the Arts, adults in Oregon attend more classical music, opera and jazz concerts per capita than in any other state and rank second in per capita attendance to the arts in general. Almost 17% of all Oregon adults attended a classical music concert in the year 2008.

City of Portland

A 2010 study by the Oregon Cultural Trust reported that total spending by non-profit arts and culture audiences in Portland was $101.4 million, with arts and culture organizations spending totaling $152 million. Jobs supported by the industry equal 8,529, and contribute $195.3 in household income. Approximately 3.9 million local residents (83.7%) attend the arts, along with 756,363 non-residents (16.3%) attendees, or an annual total of 4.6 million. Residents spend approximately $17.72 (excluding admission) on event-related spending per outing, and non-residents spend $43.13. Consumer spending on arts and culture in Portland contributes $10.9 million to the state, and $10.3 million to the local government.

The City of Portland, with population of 593,820, is the United States' 29th largest city. Its residents are primarily white (76.1%), with Hispanic (9.4%), Asian (7.1%) and African American minorities accounting for much of the balance. The city's median household income is $51,238, and its residents' median age is 35.8. The population is closely divided by males (49.5%) and females (50.5%). Most residents, 43.1%, hold college degrees, with some attaining graduate and/or professional degrees as well.

City of Eugene

The City of Eugene's 2010 population was 137,893, making it the second most populated area in the State of Oregon. The 154th largest city in the United States, Eugene's population is 88% white and 5% Hispanic. Median household incomes average $39,150, and 53.9% of the city's population has graduated from a four-year college, with some completing graduate or professional degrees. With a median age of 34, Eugene's population can be further segmented: 37.9 thousand are aged 20-34; 38.8 thousand are 35-54; 17.1 thousand are aged 55-74; and, 9.4 thousand are aged 75 and over. Eugene is comprised of 49% females and 51% males.

As reported by the Oregon Cultural Trust, total spending by non-profit arts and culture audiences in Eugene represents $16.1 million, with spending by arts and culture organizations topping $29.4 million. The industry supports 1,739 jobs, and generates $34.8 million in household income. Its contributions to local government revenue are $1.6 million, with $743,000 in state revenue. Local attendees represent 85% of total attendance to arts events held in Eugene and spend approximately $10.6 million per year (or $17.18 per event) on attendance-related expenses. Fifteen percent of attendees travel from outside the area, spending approximately $5.4 million per year (or $38.92 per event). There are roughly 796,000 arts attendees living in Eugene and surrounding areas in Lane County, and 141,000 non-resident attendees that travel to Eugene to see an arts and/or cultural event.

The Eugene community also boasts relatively high overall engagement with the arts: it ranks seventh in the nation in volunteer hours donated to the arts, fourth in the number of hours donated to the arts, and second in the number of people attending an arts event who say they are artists themselves.

The Market

Current Trends

The National Arts Market

The *2013 National Arts Index*, generated by Americans for the Arts, reported that the national arts industry is lagging behind the economic recovery, with many non-profits arts organizations still ailing financially (44%). In 2013, there were 95,000 non-profit arts organizations in the United States; 800,000 more arts businesses; 2.1 million artists active in the workforce; and had $153 billion in consumer spending against the arts. In 2011, it was estimated that one in three, or 33% of the total U.S. adult population had attended a live performing arts event.

According to the NEA's *Survey of Pubic Arts Participation*, for the first time since 1982, attendance rates have decreased for virtually all arts forms. The survey counted 408 million attendances to arts events, a decrease of 20% from 2002. Additionally, the average number of attendances per patron also declined from 6.1 in 2002, to 5.2 in 2008.

A summary of trends affecting the arts industry in general from 2008 to present suggest some surprising facts:

- The U.S. arts audience, like the population as a whole, has grown older over the past decade. An analysis done by the League of American Orchestras suggests that while this is one reason for declining attendance, participation rates also tend to decline between generational audience segments, as well as within each generation as they age.

- According to the NEA, 50% of American adults have neither attended live events, nor use media to engage in the arts.

- Consumer spending on the arts remains flat at $153 billion however, because total consumer spending has increased over time, the share of spending allocated to the arts has actually slipped from 1.88% in 2002 to 1.43% in 2011.

- Arts and culture is losing its market share of philanthropy. Overall donations to the arts dropped from 4.9% of total philanthropy in 2001 to 4.1% in 2011, while education, health and environmental organizations showed growth.

- From 2002 – 2008, 45-54 year-olds, historically the largest share of arts audiences, showed the steepest declines in attendance. However, they still comprise the highest number of attendees to the arts in general, and are more likely to attend the arts than younger adults or those over sixty-five.

- Participation in arts lessons and classes is the most significant predictor of arts participation later in life, yet arts education in grades K-12, as well as for young adults (18-24 year-olds) has decreased markedly. The *National Arts Index* reported that since 2009, the percentage of college bound seniors with at least four years of arts and music education declined to 17.6% from 2006, when it averaged 20%.

- In 2008, 67% of people with graduate degrees attended at least one arts activity, compared to 38% with some college education and 19% with only a high school diploma. While arts activity is directly associated with the level of education attained, even well-educated groups of Americans were participating in the arts less than in any other year measured.

- 55% of all people that attend at least one live arts performance each year are women, and almost 50% of all attendees of arts events have household incomes of $75,000 or more.

- Arts attendance varies by geographical region: the overall percentage of people attending the arts was highest in New England and the Pacific Regions of the U.S, accounting for 42% of total attendance.

- International tourism for the arts remains strong – those attending concerts and theater performances have increased in five of the last seven years (17% since the year 2003).

- How consumers participate in and consume the arts is ever-changing. The digital age affords consumers the tools for personally curated arts events. Many Americans now use the internet to engage in artworks or performances. It's estimated that 4 in 10 U.S. adults who use the internet, do so to download, watch, or listen to music, theater or dance performances

- On average, arts events draw approximately 75% - 80% of their ticket buyers from within a 30-minute drive; 95% drive 50 minutes or less.

- Evidence suggests that for any given arts event, a majority of the audience (up to 40%) did not buy their own ticket (someone else bought it for them) or engage directly in the purchase decision. This implies a strong connection between social context and arts attendance. Types of groups that frequently come together to attend performances include: co-workers, college alumni groups, family groups and friends. Attenders that do not buy their own tickets (referred to as

shadow audiences) are difficult to track in databases, and are therefore more difficult to market for repeat purchase.

- Industry-wide, the average number of tickets per order is 2.5

- Types of unsatisfactory event experiences that may hamper attendance may include past problems with parking, HVAC, poor acoustics/ambient noise, ticketing problems, disliking programming, uncomfortable seats and/or poor performances.

- Despite declining overall attendance, and waning consumer spending, arts organizations are still fostering creativity and innovation through new works. Between 2001 and 2011, audiences were treated to more than 9000: 100 operas, 342 orchestral works, 2531 plays and 5,000 films.

The Classical (Orchestral, Choral, Chamber and Pops) Music Market

Current Trends

According to the League of American Orchestras' *Audience Demographic Research Review* (2009), and consistent with national arts industry trends, the audience for live classical music in the U.S. is declining. The 2008 NEA *Survey of Arts Participation* noted that only 9.3% (or 20.9 million) of all adults in America had attended a classical music performance in the last year. As a means of comparison, in 1992 12.5% of adults (or 23.2 million) had seen a live classical concert, and in 2002 11.6% of adults (or 23.8 million) had attended a show. The total number of people showing a preference for classical music, regardless of attendance at a live event, also decreased significantly: from 33% in 1992, to 27.4% in 2002 and most recently, 25.7% in 2008.

A segmentation study done by the Knight Foundation (that included 11,250 consumers in 15 major markets) noted that 12% of potential classical music consumers were completely unaware of their local orchestra, and only 12% could name a classical music composer or composition. Decreases in audience engagement and participation are seen across all generational segments, as well as within each segment as they age.

With regard to these trends, the live classical music audience is declining against three very specific metrics:

4. Overall participation rates have dropped (from 12.5% to 9.3%)
5. Unique audiences (the number of people who attend performances without regard to frequency) have declined by 13% (representing 3.3 million) between 2002 and 2008
6. Paid attendance has decreased by 8% between 2002 and 2008

Of the 20.9 million U.S. adults who have attended a classical music concert in the last year: 22.3% saw a symphony orchestra, 22.3% attended a classical music concert with a choir or vocal ensemble, 17.1% attended a music recital by a singer or instrumentalist and 12.5% attended a chamber music concert.

Other trends affecting the classical music audience include:

- As is consistent with the overall arts market in general, audiences are aging due both to the disproportional amount of baby boomers, and also the declining participation rates within each generation as they age.

- While some have argued that classical music is not, nor should it be elitist, the uncomfortable fact remains that live orchestral concerts reach only a handful of the population for this, among other reasons.

- Audiences for classical music are typically professional or retired, fifty plus years old, relatively affluent, well-educated and white. More women than men attend classical music performances, although men average slightly more performances per year. Most do not have children living at home. Less than 10% of the audience is under 35 years old.

- According to the Knight Foundation's *Classical Music Segmentation Study* of 15 major symphony markets, a reported 50% of subscribers are 65+ and 17% are 75 or older. Of the "potential classical music" audience queried, only 8% said they are inclined to subscribe. The lack of subscriber potential is especially true in younger audience segments.

- The 2014 Culture Track *National Study on Attitudes, Motivators and Barriers of Culturally Active Audiences* states that loyalty for classical music continues to decline. Subscription audiences have decreased from 23% in 2011, to 10% in 2014. Memberships have decreased from 26% in 2011 to 15% in 2014.

- Most major orchestras serve only 2%-3% of total adults in their respective markets.

- Nationally 52% of the base of classical music attendees typically plan 10 days or less in advance of the activity; 23% like to plan several weeks in advance and 26% like to plan more than a week ahead of time. Young audiences are the least likely to plan in advance.

- Consumption of the arts has changed in tandem with advancing technologies, it is now estimated that 18% or 40 million adults (versus 9.3 for live performances) explore classical music through the internet and other digital sources. While unexpected, these people are also two to three times more likely to attend a live performance. For some adults, electronic media represents their sole means of engaging in the arts: these are generally minorities, adults with lower household incomes, less education and/or facing economic or geographic barriers to attendance.

- Classical music CD sales plummeted in the 5-year period between 2008 (13.32 million) and 2012 (7.5 million), while classical music downloads increased significantly during the same period (63.6 million in 2008 vs. 116.7 million in 2012).

- According to the *Classical Music Segmentation Study* done by the Knight Foundation, classical radio broadcasts are still the dominant mode of consumption. A seven-year decline in the number of classical music stations corresponds with declines in listenership, despite that this medium is considered vital to audience development and retention.

- Evidence suggests that the majority of current classical music attendees developed an initial interest in this art form before the age of 14 and, that three quarters of them learned to play an instrument as a child. Even though attendees develop an interest in classical music in their pre-teen years, there is a strong probability that they won't convert to ticket buyers until 20+ years later.

- On average, 74% of orchestra ticket buyers have either played a musical instrument or performed vocal music at some point in their lives.

- In the *Classical Music Segmentation Study* of 2002, it was reported that in terms of the benefits associated with attending a classical music concert, "artistic and educational value" was ranked number one.

- In the *Audience Motivation Research Report* completed in 2001, the most important factors correlating to audience enjoyment of classical music were 'How knowledgeable I am about the music" and "How familiar I am with the music.'

- Audiences believe that the three most important features of a classical orchestra concert are:
    4. How well the music is performed
    5. The acoustics of the hall
    6. The actual works being performed

- The overwhelming motivation for attending a concert is the music itself. However, it is the barriers to purchase that more greatly affect attendance. These include: 1) Difficultly finding time in a busy schedule 2) Making a commitment ahead of time 3) Tickets costs 4) Absence of social context. These barriers are more than twice as strong for single ticket buyers and audiences younger than 35 years old, than for older audiences and subscribers.

- Roughly one-third of orchestra audiences are more sophisticated than the other two thirds. Both qualitative and quantitative data suggests that the less sophisticated audiences want a more interesting concert experience. They believe that help understanding the music and its context will make them better listeners and increase their level of enjoyment.

- Nationally, 43% of those that attend classical music concerts said that they have a favorite composer; 24% said that they have a favorite musical composition; and 20% have both.

- Of those that said that they have a favorite composer, Beethoven topped the list, followed by Mozart, Bach, Tchaikovsky and Chopin. Those that named a favorite musical composition chose Symphony No. 5 (Beethoven), Symphony No. 9 (Beethoven), Moonlight Sonata (Beethoven), Handel's Messiah, Bach's Brandenburg Concertos, Vivaldi's Four Seasons, Tchaikovsky's Nutcracker Suite and Pachelbel's Canon.

- Personal performance of classical music is highly correlated to educational level – more so than other art forms. Adults with college degrees are six times more likely to perform classical music than are high school graduates. In 2008, approximate 3.1% or seven million adults performed classical music.

- A Chorus America study titled, *America's Performing Art: A Study of Choruses, Choral Singers and Their Impact* notes that 285 million Americans (adults and children) are engaged in choral singing. Many of them sing in more than one chorus, and about one-third sing in three or more. There are an estimated 250,000 choruses in this country. In fact, more Americans engage in the public performance of choral singing than in any other art form in America.

- 70% of those who sing in choruses today say they sang in a chorus in elementary school. More than 50% say that they grew up in a home where other family members regularly sang in a chorus. Again, this evidences a strong connection between the roles of education and family in future arts engagement.

- Adults attending ballet or opera are more likely to attend a classical music concert than adults attending other art forms.

- Rates of cross over attendance between classical music and other musical genres are:

    1. Pops concert attendees are most likely to also attend classical music concerts (73%) and least likely to attend chamber music concerts.
    2. Classical orchestra attendees are least likely to attend pop concerts (43% and most likely to attend classical concerts by choirs and vocal ensembles (61%)
    3. Chamber music concert-goes are very likely to cross over to all other types of classical music, except for pops.

Future Trends

- While the majority of the American population will continue to age with corresponding declines in attendance, young, non-white minority segments are projected to drive the vast portion of gains in arts engagement in the future. Without these minorities and an additional number of younger, white adults to replace current audiences, the future of classical music will remain unsure. Classical music organizations must adopt innovative programming and utilize relevant marketing channels to reach both of these emerging audiences.

- The Hispanic/Latin American population segment is expected to outpace the growth of any other; this segment is expected to constitute more than 50% of the U.S. adult population over the next 20 years. Projections suggest that among this group, participation in live classical music will increase by 46% - from 2.4 million in 2008 to 3.5 million in 2018. Hispanics are forecasted to increase their share of the total live classical music market from 12% to 20% by 2018, as on the whole they demonstrate a stable to slightly growing affinity for classical music.

- According to The League of American Orchestras, classical music organizations must find a way to reengage American audiences and invite trail by: 1) programming an adequate number of "familiar concerts" 2) disseminating enough information that allows attendees to better understand a concert 3) make it hassle-free to attend a show 4) encourage, but not rush, the relationship building process

- The Pew Research Center, in a report titled, *"The Millennials Orchestra: Engaging Younger Symphony Audiences and Donors in the Classical Music Experience,"* mention that some organizations are using innovative programming and offering greater opportunities for audience engagement and development through: 1) Free events 2) Web-umentaries 3) Podcasts, webcasts and simulcasts 4) "popular" collaborations

- As the number of classical public and commercial radio stations continue to decrease, digital channels will be vital to both reach and educate new and younger audiences.

- Although print and broadcast sources (primarily television, newspaper and radio) are still used most often to learn about live performance events, on-line sources are growing more and more important, especially to those under the age of 44. For younger generations (millennials and GenX), social media matters most: Facebook, Twitter, Pinterest, etc.

- Because of the growing importance of digital media platforms, many arts organizations are starting to evaluate e-commerce and digital entertainment options to increase awareness, extend reach and drive revenue from younger audiences.

- Results from the *Classical Music Segmentation Study* suggest that consumers' definition of classical music is in in the throes of change, and differs from what's idealized by artistic directors, orchestras, music conductors, and programmers. Respondents cited classical music as comprising a broad array of genres including: opera, and cross-over artists. Part of this change is due to advances in digital recording and broadcast which have accelerated the diversification and fragmentation of musical tastes globally. To market appropriately to audiences in the future, organizations must be mindful of this broadening definition.

- Classical music is becoming less and less competitive with diversionary entertainment resources however adults are also evidencing a stronger and stronger need for enrichment activities. In the future, classical music should focus on promoting its strength as an enrichment activity: building awareness of what classical music delivers, and what enjoyment a familiarity of it brings.

- A comprehensive response to long-term audience development must involve a range of community partners including funders and other stakeholders in all corners of the community. Stimulating continuing creative expression through classical music and other art forms is a quality of life issue for most communities. Classical music can't survive without musicians, conductors, composers, donors, civic leaders, teachers, students, radio hosts, listeners, recording industry executives and audiences for live concerts.

The Customer

Geographic

The Oregon Bach Festival historically draws 70% of its audience from the State of Oregon (with approximately 73% coming from Eugene), 4% from the State of California and 2% from Washington State. Nine festival shows were performed in Portland in 2014, which represented 13.5% of total festival tickets, attends and sales. The Portland shows combined comprised 24%of the total shows performed during the event.

Audiences attending the Chamber Music Series are predominately from in and around the Eugene area.

Demographic (Appendix A)

Festival goers are predominately female (56% in 2010, 60.7% in 2011 and 65.9% in 2012), aged 55-74, with annual household incomes between $50,000 and $149,000, and either work full-time or retired (49.1% were retired in 2011 and 51.9% in 2012). The four most likely occupations of audience members are (in order of predominance): teaching, managerial/professional, healthcare and technical/scientific.

No demographic, psychographic or behavioral research is presently available for ChamberMusic@Beall audiences.

Psychographic

According to secondary research, most concert attendees share similar and strong lifestyle traits:

- 80% enjoy experiences that stimulate the senses
- 80% of seek experiences that challenge them to think and grow
- 75% subscribe to one or more daily newspaper
- Magazine readership tends toward news and culture, rather than home, food and/or fashion
- They attend religious services frequently: 72% attend at least once per month, 57% attend three or more times
- They're heavy travelers, with 10% or more reporting that they've taken 10 or more pleasure trips in the preceding year
- Frequent internet users
- 65% think it's important to break routine and get away for an evening
- Less than 25% describe their lives as pretty much the same from week to week
- Attenders are community oriented: approximately half do volunteer work regularly

Behavioral

Ticket buyers for the Oregon Bach Festival typically behave similarly from year to year. To illustrate their purchasing behavior, the following facts hold true of audiences from 2010 -2012:

- 32% of ticket purchases are typically made on-line, 41% by phone and the 27% at the box office either in advance or the day of the show
- Average total number of performances seen by a festival goer is 2.4 events

- The majority of ticket buyers (58.3% in 2010, 54.5% in 2011 and 54.1% in 2012) have been attending the Festival for 3+ years, although the second largest individual buying group (after the group that's been attending for 10+ years) is first time attenders (26.9% in 2010, 30.5% in 2011 and 22.9% in 2012)

- Single tickets are purchased 30 days in advance by approximately 50% of attendees, 63% purchase two weeks in advance and 77% have purchased tickets by opening night.

- The average number of performances seen by a Gold Card holder was 22.6

- In 2014, there were 419 Festival Friends who represented $121,240 in ticket income total, or $292 per Friend. This represents over 20% of total ticket revenue for that year.

- The incidence of social media use continues to increase among the Festival's audience members. Usage of Facebook, which is the most popular vehicle among attendees, has increased by 15% each year. In 2012, 80.3% of Festival audiences were frequent Facebook users. You Tube and Twitter round out the top three social media sources used by audience members.

The Competition

There are approximately 1228 non-profit arts organizations in the State of Oregon: 327 of those are located in Portland and 134 in Lane County. These organizations, plus movie theaters, sports games, theme parks, outdoor festivals and other events/attractions that compete for consumer spending on leisure can be considered direct and indirect competitors depending on location, scheduling, degree of audience overlap, programming, ticket price, etc.

Listed below are the largest arts organizations in Oregon. While only two are considered indirect competitors to the 2015 Bach Festival, each of these organizations still competes for a share of the same market:

- *The Shakespeare Festival* – Ashland, OR. Founded in 1935, annual attendance at this event tops 400,000. The event runs from mid-February – November and presents 760 performances of the 11 plays in its repertoire (only 3 are Shakespeare), as well as modern and contemporary works and world premieres. The Oregon Shakespeare Festival also offers a diverse range of experiences which include backstage tours, park talks, lectures, classes, workshops and pre- and post-show conversations.

- *Oregon Symphony Orchestra* – Portland, OR. Founded in 1896 as the Portland Symphony, annual attendance is estimated to be 225,000. Total operating budget is $13.8 million. Performances (40+ per year in Portland, with additional performances in Salem and touring sites) range from classical to contemporary to pops. Upcoming 2014-2015 guest artists include Ben Folds Five, Brandi Carlisle, Herbie Handcock, Storm Large, Nadia Salerno-Sonnenberg, Itzhak Perlman, and Bernadette Peters. OSO has a huge children's programming component (kinderconcerts, children's concerts and youth concerts), as well as a variety of educational and community programs.

- *Portland Art Museum* – Portland, OR. Founded in 1892. The museum houses the oldest and largest visual and media arts center, and is distinguished for its permanent collections: Native American art, English Silver and Graphic Arts. It's internationally recognized for both its permanent collections and ambitious special exhibits. The museum has a membership base of 23,000 households and hosts 350,000 annual visitors. Children are admitted for free.

- *Portland Opera* – Portland, OR. Established in 1964. The Opera programs its concerts from November through March. During its 2014-2015 season the company will be performing five operas, and doing three to six performances of each. Operas range from traditional (Carmen) to contemporary (Showboat). Portland Opera also sponsors year-round educational and outreach programs in Portland and other sites throughout the state.

More threatening to attendance are direct competitors; they can be defined as arts organizations or events that not only have a share of market, but also take place in the same location as Festival shows, offer similar programming, attract the same target audience groups, and/or are scheduled at the same time. In Portland these include:

- Chamber Music Northwest (6/22 – 7/26)
- Organic Beer Festival (6/26)
- World Beat Festival (6/ 27 and 6/28)
- Blues Festival (7/2-7/5)
- Bastille Day French Festival (7/11)

In Eugene, direct competitors include:

- USA Outdoor Track and Field Championships (6/24-6/28)
- Oregon Country Fair
- First Friday Events and Activities

Because its programs are scheduled from October through May, the ChamberMusic@Beall is actually subject to a higher degree of competition from Eugene-area arts organizations, as many of them share similar scheduling, as well as audience composition. These include:

- *The Hult Center for the Performing Arts* – Eugene, OR. Established in 1982. Hosts an estimated 700 events and activities each year. Some are presented independently by the Hult, others are the product of its seven local resident companies. Aside from the Oregon Bach Festival, they include Ballet Fantastique, Eugene Ballet Company, Eugene Concert Choir, Eugene Opera, Eugene Symphony, and the Shedd Institute.

In 2014 and 2015, the Hult will present three programs that coincide directly with CM@B shows: Eugene Ballet's Carmen (February 15th), Ballet Fantastique's, The Odyssey (March 1st) and Eugene Ballet's Tommy (April 12th).

A representation of the myriad of other Eugene Arts Organizations each vying for share of market and voice during the Chamber Music series:

- American Harp Society
- Cascade Chorus
- Chamber Music Amici
- Oregon Brass Society
- Oregon Mozart Players
- Riverside Chamber Symphony
- Willamette Jazz Society
- Oregon Coast Chamber Orchestra
- Eugene/Springfield Youth Orchestras
- Jordan Schnitzer Museum of Art
- Museum of Natural and Cultural History
- Oregon Folklife Network

According to the Bach Cantata Website (www.bach-cantatas.com), there are over 70 dedicated Bach festivals and programs in the United States, as well as countless ones worldwide.

SWOT Analysis

Strengths

- Adults in the State of Oregon attend more classical music, opera and jazz concerts per capita than in any other state and rank second in per capita attendance to the arts in general. Almost 17% of all Oregon adults attended a classical music concert in the year 2008. This rate of attendance is almost twice as high as the national norm.

- Oregon Bach Festival has a 45-year-old legacy of offering Eugene audiences (and to a lesser extent other audiences along the Oregon Coast or in Portland) quality performances of choral-orchestral music, classical music, classically-influenced cross-over artists, chamber music, solo recitals, collaborative programs, educational opportunities and community events. To this end, the Festival has won the hearts of local audiences and has become well-regarded internationally. Writers from *The Times* of London, the *Los Angeles Times*, and the *Wall Street Journal* have praised the Festival for its *"pioneering approach to programming,"* describing it as *"virtually without equal in America"* and *"one of the world's leading music festivals."*

- Having once been considered a part of the University of Oregon's School of Music, the Festival won unwavering support from the University which continues through present day. This support, unique to a non-profit arts organization, affords the Festival countless benefits and opportunities not otherwise afforded to a similar arts organization.

- Oregon Bach Festival's new Artistic Director, is undoubtedly one of today's leading young conductors on the international stage. Having come to prominence as a harpsichordist and organist, as well as early music director, Matthew Halls is now better known for his dynamic, innovative and intelligent work with major symphony orchestras and opera companies.

- The Oregon Bach Festival continues to attract world-class vocalists, orchestra members, historically informed instrumentalists, guest performers, program directors, and support staff (volunteers, interns, etc.). Many of these guests are quite loyal to the event, and have had long term relationships with it, over countless years.

- Given that the majority of the population in Eugene is over forty-five years old, 54% have college or graduate degrees and one third of all households earn at least $50,000 annually, the target pool of patrons is significantly greater (per capita) than in other U.S. locations.

- While most classical arts organizations are struggling to identify new audiences, Festival research suggests that in each year from 2010 through 2012, the Oregon Bach Festival attracted well over 20% new attendees. This is well above the national norm, and also a positive indication of potential growth for the event.

- Now fully staffed in the areas of marketing and development, the Festival is poised to more successfully increase attendance, and increase funding support.

Weaknesses

- One of the Festival's greatest obstacles is its summertime schedule that inadvertently discourages attendance from University students and faculty, as well as residents of Eugene and Portland who travel during the summer and/or over summer weekends.

- Eugene and Portland lack perfectly-sized and appropriate venues (600-800 seats) that can accommodate both realistic audiences, meet programming specifications and please patrons.

- While, according to Hult Center sales figures, the number of Oregon Bach Festival attenders has not decreased significantly over the past three years, the number of performances that each attends has declined.

- In studying the behavior of Festival attendees over time, we can see that there is a significant decline in the percentage of those that return to the festival after attending for the first time. So, although trial is greater than that of many non-profits, audience retention after the first-year experience is less than the norm.

- Both classical music stations and local newspapers are devoting less airtime and/or space to the play and promotion of classical music. Due to a decrease of arts and entertainment writers, a decline in Festival publicity in Eugene's Register Guard was especially obvious during the 2014 event. There is no word whether this shortage of writers/reviewers will continue in 2015.

KWAX's Caitriona Bolster, on-air host and OBF supporter has recently retired, which may threaten the degree of publicity afforded to us by the station in 2015.

- While Eugene audiences have certainly begun to embrace Matthew Halls, he has not yet earned the same level of recognition and loyalty as Helmuth Rilling. As this will take time to ensure, we must continue to be mindful of how Matthew is portrayed and promoted.

- Even after several forays into the Portland market over the last several years, the Oregon Bach Festival has not earned sufficient awareness in that market to meet audience goals. In addition, advertising to single ticket buyers is significantly more expensive than in Eugene or smaller markets, due to a much higher degree of media fragmentation.

- The majority of past Festival advertising and promotion has featured the Artistic Director, rather than specific programming or other facets of the Festival (education, community, collaborations). This single focus has resulted in a public perceptions that the festival is limited to music and music-related lectures, instead of offering a broad range of opportunities for audiences of all kinds

- Because the Festival has traditionally used a broad pool of vendors for advertising, media, publicity, collateral, etc., the organization's control over the look and content of these materials has been scattershot. Creative inconsistency compromises brand image and hampers memorability, thereby restricting its effectiveness.

- ChamberMusic@Beall, a collaborative effort between the Festival and the University of Oregon's School of Music and Dance, puts a strain on both OBF labor and resources, without direct benefit to the Festival in terms of branding, fundraising and/or earned revenue generation. The School of Music and Dance currently controls the budget for this program, although OBF programs the series, and takes primary responsibility for marketing and ticket sales.

Opportunities

- Because we know that arts education and exposure are the leading indicators of future arts attendance, and given that the Festival supports programs dedicated to educating both youths and young adults, it has a ready-made "pool" of prospects for future attendance and support.

- Evidence suggests that Oregon Bach Festival audiences are quite technologically-savvy, based on the number of on-line ticket sales, web site analytics, and past audience surveys. This suggests that there may be an opportunity for the Festival to explore revenue generating options presented by current technologies such as downloads of Festival recordings, on-line sales of Festival merchandise, on-line classes, paid programming, etc

- We know that classical music audiences, who are relatively affluent, are not concerned with ticket prices, and are more apt to base buying decisions on programming. Therefore, there may be some opportunity to increase prices for specific programs/events. We also know that younger, potential classical music audiences are much more price sensitive. In order to stimulate trial among these new audiences, the Oregon Bach Festival may want to expand community offerings to appeal to those that are reluctant to pay high ticket prices.

- Research tells us that a primary reason that attendance suffers in the 25-44 age group is the presence of children in the household. Family programming can help give parents a chance to

attend live classical music concerts, while at the same time entertaining and educating their children.

- Although ChamberMusic@Beall currently lends little benefit to the Festival in relation to the amount of time and resources it takes to program, fund and market, there is an opportunity to make it a more viable year-round series. This would entail bringing the series wholly in-house, and negotiating a take-over with the School of Music. This would result in The Festival having a stronger full-year presence and the ability to program the series within the same parameters as its summer event. With this change, there is the potential for the Festival to generate revenue (through ticket sales and sponsorships) that would offset the cost of labor and other resources.

- To offset declines in the number of programs purchased by Festival attendees, create a ticket package that is attractive enough to encourage attendees to see additional shows (e.g. a "pick three" or "pick four" option) thereby increasing the number of "unique attends".

- Instead of using the artistic director as the "star" of all Festival advertising and promotional materials, utilize him as the facilitator of a range of programs available to all audiences (music, education, community and collaborations). This makes programming the focal point of the Festival, which is more likely to create awareness of everything the event has to offer including not only musical programming, but educational, community and collaborative programming as well.

- To be more successful in Portland, limit the number of shows, be cautious of venue choices and restrict musical programming to concerts which have a precedent of success. This will help guarantee that each program meets revenue and attendance goals.

- Use a much more limited group of vendors for creation of all advertising and promotional materials to achieve creative consistency, thereby enhancing brand image, awareness and memorability.

Threats

- Festival attendees are getting older (in line with national norms). In 2010, 47.5% were retired. In 2011, 49.1% retired and in 2012, 51.9% were retired. With the majority of our audience falling into this advanced age bracket, and unless we successfully replace them over the next decade with younger audiences, we will soon suffer significant declines in overall Festival attendance that will be difficult to reverse.

- Because the definition of "classical music" is becoming much broader, especially among younger, less sophisticated audiences, we must be mindful that to them, there is little distinction between Bach and Brightman. We will either need to program with this in mind, or take the burden of educating these audiences in order to convert them to attendees.

- Rapidly advancing technologies, combined with the predisposition of classical music audiences to use this medium to listen to or watch live performances, may affect attendance in the future for the Festival's live events. Some orchestras are already simulcasting performances to movie theaters to make concerts more "accessible" to audiences.

- Widespread decreases in arts education, especially in grades K-12, threaten the possibility of younger generations embracing arts attendance later in life. It may become necessary for arts

organizations, through outreach efforts, to take responsibility for educating children in order to guarantee their attendance at, and participation in, events later in their lives.

- The less musically sophisticated an audience member is, the more importance they place on the "overall" concert experience (ease of purchasing tickets, parking, venue acoustics, etc.). As we cater to first-time attendees, and younger, less-knowledgeable audiences, it is especially important that we pay close attention to these details.

Marketing Objectives

The following are goals for short and long term marketing efforts:

Short Term

- Now that the artistic transition is complete, and Matthew Halls is firmly established as the Festival's new artistic leader, move away from "Next Generation" market positioning in favor of something more relevant and compelling to consumers.

- Provide general marketing support for the Oregon Bach Festival, as well as all Festival Programs both prior to and during the event.

- Maintain higher levels of creative consistency in all branded materials for marketing, development, education and community initiatives to earn greater levels of recognition and memorability.

- While maintaining loyalty among long-term patrons, encourage repeat attendance from first-timers and trial from new audiences

- Stimulate greater "unique attendance," by offering a compelling reason for those that attend to see additional shows, or participate in a larger number of events.

- Meet/exceed revenue and attendance goals

- Provide adequate marketing support for the 2014-2015 Chamber Music Series with the edict (from the School of Music) to decrease marketing expenses significantly in comparison to last year.

- "Mine" promotional opportunities in Portland (to support Festival shows performed there, if appropriate) to more successfully market to local audiences in a more well-targeted and cost-efficient manner.

- Continue to provide marketing support to Oregon Bach Festival's Development and Educational programs, as well as Festival and Chamber Music Events

- Maintain advocacy of OBF with all groups including: Trustees, University of Oregon Departments, venue representatives, media personnel, donors, patrons, volunteers, key community leaders and all other constituencies

- Identify additional revenue streams including merchandising, on-line educational or musical offerings, business partnerships, etc.

Long Term

- Increase Festival "paid attendance" and earned revenue by 2.5% each year, for three years in succession, until 2017. Concentrate efforts on retention and the acquisition of younger audiences.

- Determine success of market repositioning by measuring increases in awareness, as well as rates of audience acquisition and retention

- Begin to source "cultural tourism" audiences

- Identify new marketing methods that may be especially attractive to younger/new audiences.

- Stimulate attendance in the 35-44 and 45-54 age groups

- Help determine the fate of the Chamber Music Series: will it become a full-year, program entity branded solely by OBF? If so, what shape will it take, and how will it be marketed?

- Continue to promote all facets of Festival programming as the priority marketing message; move away from using the Artistic Director to embody the event.

Market Positioning

To acknowledge the artistic transition that occurred formally in 2014 from Helmuth Rilling to Matthew Halls, as well as with the hope of attracting new and younger audiences, the organization created the "Next Generation" positioning last year. It provided the foundation for all marketing efforts. Using the image of the Festival's young, charismatic Artistic Director was not a new concept; it followed the same blueprint as past marketing campaigns that showcased Helmuth Rilling.

It is strongly recommended, that moving forward, the Festival positions itself within the rapidly changing marketplace by capitalizing on a unique point of differentiation to distinguish itself from competition, as well as to attract new and retain existing audiences. This strategy will offer a more compelling reason for people to attend and participate.

Based on this reasoning, the Festival's market position should encapsulate that:

- The Oregon Bach Festival offers all audiences a chance to discover, experience, learn and be entertained through the widest variety of high quality classical music concerts, lectures, symposiums, workshops and community programming available in a festival format. These opportunities are not only designed for more sophisticated and knowledgeable classical music audiences, they are created for first-time attendees and novices too.

In lieu of using images of the Artistic Director to drive interest, awareness and attendance, Matthew Halls will instead be depicted as the facilitator of musical, educational, collaborative and community programming to fulfill this market position.

Marketing Strategies

Based on this market positioning, and in order to realize short and long term marketing goals, the following strategies will be employed

Short Term

- Utilize a mix of media to promote the Festival brand prior to the announcement of event specifics: newspaper, magazine, outdoor, internet, website, social media and e-mail blasts.

- Once Festival specifics have been announced, use market positioning as the underpinning of more specific program advertising created just prior to and during the event using a similar media mix (with the addition of broadcast).

- Support all OBF education and development programs with marketing materials that extend the overall brand reach and work together with Festival-specific image and programming materials to create a more cohesive image for the organization. Once the fate of the 2016 Chamber Music Series is determined, integrate it into the campaign, if appropriate.

- Exploit all relevant press and publicity opportunities to achieve desired results against objectives

- Employ a smaller pool of outside marketing resources to ensure that all materials, across all programming channels, look and sound the same way: the Gilmore Agency, Jon Christopher Myers and RBL Interactive

- Use "community (non-paid)" events as a gateway to attract new and younger audiences, and targeted promotional mailings (e-mails and snail-mails) to increase repeat attendance from those that "churned" after year one.

- Stimulate "unique attendance (the number of shows seen by one audience member)" by creating a "pick three" Festival package: any three full-price shows or events for a thirty percent discount (10% off each one of three tickets). There may also be an opportunity to partner with local businesses (restaurants, parking lots, etc.) to provide added value to these packages via offers to "pick three" patrons. Attendees can buy as many of these packages as they like prior to opening night.

- Plan realistic attendance and revenue goals for all 2015 Festival programs, keeping in mind that all "paid programming" should be self-sustaining.

- Investigate a partnership with the University's Duck Store to determine their interest in co-managing a "Festival boutique" with co-branded merchandise. These items (t-shirts, sweatshirts, tote bags, etc.) would be sold at all Festival shows, on-line and at The Duck Store.

- Explore additional merchandising opportunities to exploit possible revenue streams from the on-line sale of CD's, webcasts, podcasts, webinars, etc.

- Seek out the opportunity to network with any and all key constituencies in order to advocate for OBF

Long Term Strategies

- Analyze metrics from all media and promotional programs to determine what efforts are yielding the best results against target objectives. Adjust creative materials, communications messaging and media plans as necessary based on results.

- If re-positioning efforts are deemed successful, create new identity package. Materials should be created that are more in line with overall positioning and efforts against new target groups.

- Source potential cultural tourism audience by identifying contacts and forming relationships within markets such as travel and tourism, meeting and convention planners, tour operators, travel planners, membership associations, etc.

- Attract new and younger audience through the utilization of advanced technologies and social media, to which they're predisposed, to both promote Festival programs and provide enhanced information dissemination to Festival audiences during the event

- Increase attendance among patrons 35-54, by encouraging the implementation of "family programming." Not only will this help increase attendance from households with children, it will also provide an opportunity for parents to expose their children to the arts, thereby seeding a new generation of arts-goers.

- Work with schools, summer camps and youth organizations to provide outreach to children who do not have access to the arts, thereby predisposing them to future attendance.

Creative Strategy

2015 Image/Positioning Campaign

Situation Analysis – Key Insight

Given the rapidly changing landscapes of the U.S. arts market, classical music market and the Oregon Bach Festival, it is imperative that we address the need for a more relevant and compelling market position to help the organization best meet ensuing challenges. Not only will this help distinguish us from both direct and indirect competitors and provide a more holistic basis for attendance and funding, it will also ensure that the Oregon Bach Festival can meet its organizational objectives of continued sustainability and growth.

Communications Challenge

As long as the Festival has existed, it's relied on the strength and popularity of its artistic leader to predispose audience awareness, attendance and participation. Now, just after its 45th anniversary year, the Festival has evolved past the point where this focus is relevant or viable. With a new Artistic Director, more innovative music programming, additional educational initiatives and expanded community programs, the Oregon Bach Festival must find a more meaningful point of differentiation.

Objectives

- Encourage loyalty and repeat attendance from current audiences for Festival music, educational and community programs
- Stimulate interest, awareness and attendance from new and younger audience groups
- Meet attendance and revenue objectives

Unique Marketing Proposition

Oregon Bach Festival: a Full Menu of Musical Inspiration.

Support for that Proposition

The Oregon Bach Festival offers **all audiences** a chance to discover, experience, learn and be entertained through the widest variety of high quality classical music concerts, lectures, symposiums, workshops and community programming available in a festival format. These opportunities are not only designed for sophisticated and knowledgeable classical music audiences, they are created for first-time attendees and novices too.

Target Audiences

Target groups for the Bach Festival and Chamber Music Series are those that currently live in Eugene or surrounding areas, who are primarily:

- Current, loyal, OBF audiences (aged 55+, working full time or retired, HHI's $50,000+)
- Prospective classical music attendees, aged 35 – 54, well-educated, HHI's $50,000
- Current or prospective sponsors/donors/friends

And, secondarily, for education programs:

- Vocal or music students (high school, college, young professionals or adults) that want an opportunity to participate in SFYCA, the Organ Institute, Berwick Academy, Master classes, Composer's Symposium and/or Choral Teachers' Workshop.

Brand Personality

Accessible, yet simply complex; like a good wine.

Considerations

Creative development for an image campaign which will be used to launch the 2015 Oregon Bach Festival, as well as all related programs. Materials will include program books, brochures, posters, and other non-program specific efforts. Concept should be strategically sound, and emotionally compelling to audiences of all ages.

Mandatories

OBF logo, website and festival dates.

Action Plan and Timing

Task	*Date*
Marketing Plan Approval	10/13/14
Creative Briefing – Image Campaign	10/15/14
Begin Advertising Plan for 2015	10/20/14
Concepts for Image Campaign Due	10/27/14
Final Approval of Image Campaign Concepts	11/14/14
Complete Advertising Plan	11/17/14
Image Materials in Production	12/1/14
2015 Advertising Plan Approved	12/1/14

Oregon Bach Festival Audience Statistics: 2010-2012

	2010 - #	2010 - %	2011-#	2011 - %	2012-#	2012 - %
Gender						
Male	180	44.0%	265	39.3%	272	34.1%
Female	229	56.0%	409	60.7%	525	65.9%
Age						
18-24	13	3.2%	9	1.3%	7	1.0%
25-34	16	3.9%	25	3.7%	38	4.8%
35-44	25	6.1%	50	7.4%	38	4.8%
45-54	46	11.2%	91	13.4%	88	11.0%
55-64	129	31.4%	216	31.9%	274	34.4%
65-74	131	31.9%	203	29.9%	260	32.6%
75+	51	12.4%	84	12.4%	92	11.5%
Occupation						
Teaching	133	41.8%	202	37.2%	250	39.0%
Mngmt./Prof	63	19.8%	123	22.7%	139	21.7%
Tech/Sci	33	10.4%	50	9.2%	71	11.1%
Healthcare	41	12.9%	91	16.8%	100	15.6%
Public Admin./Gov't	21	6.6%	40	7.4%	34	5.3%

HHI's								
Under $15,000	18	5.0%		15	2.6%		14	2.1%
$15,000 - 24,999	10	2.8%		20	3.5%		28	4.2%
$25,000 - 34,999	21	5.8%		37	6.4%		38	5.7%
$35,000 - 49,999	45	12.5%		54	9.3%		82	12.2%
$50,000 - 74,999	73	20.3%		133	23.0%		147	21.9%
$75,000 - 99,999	86	23.9%		123	21.2%		139	20.7%
$100,000 - 149,999	64	17.8%		122	21.1%		126	18.8%
$150,000 - 249,999	31	8.6%		59	10.2%		70	10.4%
$250,000 +	12	3.3%		16	2.8%		26	3.9%
Employment Status								
Student	21	5.4%		18	2.8%		18	2.3%
Part-time	48	12.4%		85	13.2%		114	14.8%
Full-Time	134	34.6%		225	34.9%		238	30.9%
Retired	184	47.5%		317	49.1%		399	51.9%
Years of Attendance								
1 Year	111	26.9%		209	30.5%		230	22.9%
2-3 Years	61	14.8%		102	14.9%		132	16.7%
3-5 Years	39	9.4%		77	11.2%		80	10.1%
5-10 Years	53	12.8%		75	10.9%		102	12.9%
10+ Years	149	36.1%		222	32.4%		245	31.1%

Research References and Methodologies

1. *Audience Motivation Research Project, 2001.* U.S. Orchestra Marketing Directors and Managers Taskforce for the League of American Orchestras. Findings based on a Gallup survey of 21-orchestra cities across America, and two qualitative research phases: SpencerHall began the project by attempting to discover the perceptions of high, medium and low-involved live orchestra patrons and post quantitative analysis was conducted by Prescott and Associates to better understand the specific of market segment behavior.
2. *How Technology Influences Arts Participation, 2009.* National Endowment for the Arts. This report examines how Americans participate in the arts via electronic and digital media. Based on the 2008 NEA Survey of Public Participation in the arts, which asked 18,000 adults about their engagement with the arts in America.
3. *Audience Demographic Research Review, 2009.* The League of American Orchestras. Report is based on the analysis of participation rates and unique audience trends, using survey data from the NEA and Experian Simmons to determine the implications of demographic momentum for live classical music, as well as trends in digital media from a variety of sources: Experian Simmons, Nielsen, Veronis Suhler Stevenson and the McKinsey iConsumer survey. Over 150,000 people combined lent insights to this compilation.
4. *Classical Music Segmentation Study, 2002.* John S. and James L. Knight Foundation. Study was commissioned by 15 American Orchestras. Study based on: 1) National survey of 2200 adults 2) Local survey of 11,300 (750 per market in 15 major metros corresponding to each of the commissioning orchestras)) 3) 1500 orchestra ticket buyers in each of the 15 major metros (750 single ticket buyers and 750 subscribers). At the end of the two-year study, 10,000 responses were qualified relating to a wide range of variables of classical music participation.
5. *2008 Survey of Public Arts Participation.* National Endowment of the Arts. Performed by the U.S. Census Bureau, which collected data concerning arts participation from more than 18,000 adults across the United States, represented the largest, data source for a broad range of arts participation in the U.S.
6. *2012 Survey of Public Arts Participation.* National Endowment of the Arts. Summary of updates to 2008 report.
7. *Audience Growth: It's not Just Good Marketing, 2009. Oliver Wyman.* Based on a random sample of patrons from the box office data bases of 9 Prominent US Orchestras.
8. *Culture Track '14* – LaPlaca Cohen. Based on 4036 interviews with arts attendees: all 50 states were represented.
9. *Engaging Next Generation Audiences, 2013* – Wolf & Brown for the Andrew Mellon Foundation. Based on multiple focus groups and student interviews on nine American college campuses.
10. *The Chorus Impact Study, 2009.* Chorus America. Study conducted by Grunwald Associates, LLC. The attitudes, opinions and activities of more than 2000 singers in choruses of all kinds, 500 parents and 300 K-12th grade educators throughout the U.S. via on-line surveys.

Appendix K

Draft Revision of the Charter and Bylaws, granting special authority to the Board of Directors of the Friends of the Oregon Bach Festival

In February and March 2014, with the approval and encouragement of Scott Coltrane (Senior Vice-President & Provost of the University of Oregon), Dr John Evans (President & General Director of the Oregon Bach Festival) and Randy Geller (General Counsel to the University of Oregon), attempted a broad revision of the Charter and Bylaws granted by the UO President's Office, to the Board of the Friends of the Oregon Bach Festival.

The last revision of the original Charter and Bylaws (which date back to 1992, enacted by UO President Myles Brand) was undertaken by UO President Dave Frohnmayer in August 2007, and it was felt that it was time to revisit these documents, in order the clarify, still further, the constitution and function of the 'Board' for the next decade.

Scott Coltrane approved the first Evans/Geller draft revision by the end of March 2014, and a discussion ensued on the proposal of repositioning the OBF 'Board' as Leadership Council, as is the case at the Jordon Schnitzer Museum of Arts. This proposal, and the redraft of the papers were shared with the Board's Executive Committee on April 14 2014. At the committee's request, these proposals were not shared with Board members at that time, and it received a somewhat hostile reception. It was also felt that it was too close to the run-up for the 2014 season to broach the issues it raised with a wider group of community leaders, and so it has remained dormant since April.

The following pages contain the two revised documents, incorporating all the changes that were discussed at that time. I believe that a repositioning of the 'Board' is crucial to the future stability of the OBF, and that each and every revision is necessary at this point in time, given the cross-road that the OBF is currently navigating.

CHARTER
GRANTING SPECIAL AUTHORITY
to the
LEADERSHIP COUNCIL
of the
OREGON BACH FESTIVAL

Enacted by Myles Brand, (past) President, University of Oregon
June 2, 1992
Re-enacted by Dave Frohnmayer, (past) President, University of Oregon
August 7, 2007
Michael Gottfredson, President, University of Oregon
[Date]

The mission of the Oregon Bach Festival is to inspire the human spirit through the art of music. As a program of the University of Oregon, the Festival provides the highest quality of performances and innovative educational opportunities, involving a broad-based community of musicians, audiences, and donors in a manner that assures the long-term sustainability of the organization and continued accessibility to future generations.

The mandate of the Oregon Bach Festival, as a program of the University of Oregon supported by the community, is to provide a variety of performance and educational opportunities of acknowledged quality to students, professional musicians and the public. Maintenance of fiscal solvency is part of the mandate of the Festival. The Oregon Bach Festival shall strive to make its programs accessible to all interested persons.

It is the purpose of this Charter to articulate the partnership between the University of Oregon and the Friends of the Festival, for ensuring the financial stability, artistic excellence and educational integrity of the Oregon Bach Festival as an event of national and international distinction.

PREAMBLE

The University of Oregon is dedicated to the belief that all Oregonians should have the opportunities to experience the artistic and educational excellence of the Oregon Bach Festival. Such opportunities should occur both on campus and in the larger community as part of the natural extension of concert events and educational programs.

The future of this Festival depends on its ability to cultivate and employ the resources and interests of the University and non-University communities. The Friends of the Oregon Bach Festival exists to provide advice to and advocacy and fundraising for the Festival. The University of Oregon provides essential infrastructure and operational support for the Festival with the expectation that all Festival-related activities will be self-supporting. The University provides a base operating budget to cover essential staff salaries and benefits, with additional support through University Advancement and the University of Oregon Foundation designed to build endowments and a Planned Giving program that will stabilize the funding base budget for the Festival in perpetuity. The budget of the Festival is managed within the

framework of the University's budget office and is subject to all standard policies, practices and Oregon Administrative Regulations governing the University of Oregon. This Charter grants the Leadership Council of the Oregon Bach Festival a critical role in contributing to the Festival's finances and development, artistic direction and educational programs. This Charter also requires the Leadership Council to share responsibility with the University of Oregon for the stewardship of the Festival.

RELATION OF THE CHARTER TO FESTIVAL BYLAWS

The terms of this Charter exist concomitantly with the Bylaws of the Leadership Council of the Oregon Bach Festival, approved most recently by the members.

Any changes in the Bylaws that affect the terms of the Charter require the concurrence of the President of the University of Oregon. Similarly, any changes in the Charter that affect the terms of the Bylaws of the Friends of the Festival require the concurrence of the Friends of the Festival.

COMPOSITION OF THE LEADERSHIP COUNCIL OF THE OREGON BACH FESTIVAL

The composition of the Leadership Council of the Oregon Bach Festival shall follow the terms set forth in the Friends of the Festival Bylaws. The nomination, composition, election, terms of office, meetings and committee status of Directors is established in the Bylaws.

POWERS OF THE LEADERSHIP COUNCIL

All powers of the Leadership Council granted by this Charter shall be exercised under the authority of the President of the University of Oregon. The Leadership Council shall:

- In conjunction with the President of the University of Oregon, the executive staff and artists of the Oregon Bach Festival, define and establish the mission of the Festival.
- Advise and assist the University of Oregon in the appointments of the key leadership positions of General Director and Artistic Director.
- Review the budget for each Festival.

RESPONSIBILITIES OF THE LEADERSHIP COUNCIL

The Leadership Council shall have the following special responsibilities concerning the Festival in addition to the responsibilities imposed by the Bylaws of the Leadership Council of the Oregon Bach Festival.

- Review the budget of the Festival at Council meetings.
- Assist the General Director, Festival, and Development staff in setting priorities for operational and long-term fund raising.
- Contribute to the Festival on an annual basis in an amount in excess of $2,500 in cash.

- Encourage contributions to the Festival from friends, artists, master class alumni, corporations, foundations and other organizations.

- Transfer, convey and deliver freely any and all monies and property acquired by it to the Vice President for Finance and Administration of the University of Oregon. The Vice President for Finance and Administration will determine whether the University will accept any such moneys and property. .

- Act as advocates for Festival artistic and educational programming and for the needs of the greater arts community at local, state, and national levels.

- Provide leadership to the Friends of the Festival through participation at the committee level.

- Be available for consultation regarding the Performance Reviews of the key leadership staff.

Signed on this day of _____

By _____

~~*Dave Frohnmayer*~~ *Michael Gottfredson*

President

University of Oregon

Eugene, Oregon

THE BYLAWS

OF THE LEADERSHIP COUNCIL OF THE

OREGON BACH FESTIVAL

ARTICLE 1-NAME

The Oregon Bach Festival **(Festival)** is a program of the University of Oregon. The Friends of the Oregon Bach Festival **(Friends)** is an unincorporated support group of the Festival, and, therefore, neither the Friends nor the members of the Leadership Council, nor its officers are authorized volunteers of the University of Oregon.

ARTICLE 2-PURPOSE

The Friends through its Leadership Council shall work to provide the Festival with the views and support of the public. The Friends through its Leadership Council shall support the Festival by working to ensure its financial stability, advocating educational integrity and artistic excellence in its programs, assisting and promoting its events and activities, and by giving the advice and assistance as set out in the Charter Granting Special Authority to the Leadership Council of the Oregon Bach Festival **(Charter)** and as requested by the Festival. Work to ensure financial stability includes a regular review of Festival budgeting and financial performance, consultation in setting priorities for operational and endowment fund raising, assistance in obtaining donations, and making financial contributions.

A copy of the Charter is marked **Exhibit A** and attached.

ARTICLE 3-MEMBERS

Section 1.Qualification And Term A person shall become a member of the Friends **(Member)** by making a financial contribution to the Festival that qualifies for the annual giving category designated by the Festival from time to time for membership. The term of membership in the Friends is the calendar year.

Section 2. Annual Meeting The annual meeting of Members **(Annual Meeting)** shall be held near the end or beginning of a calendar year on a date set by the officers **(of the Leadership Council)** at least sixty (60) days prior.

Section 3. Special Meetings Special Meetings of Members shall be held at the call of the Leadership Council, or by the call of Members numbering at least ten (10) percent of the membership. The call shall describe the purpose for the Special Meeting, be dated, and if made by Members then signed by such Members, and delivered to the Secretary.

Section 4. Notice Of Meetings Notice of meetings of Members shall be given to each Member at its last address of record, by first class mail at least fifteen (15) days before the meeting, or by means other than first class mail at least thirty (30) days but not more than sixty (60) days before the meeting. The notice shall state the date, time, place, and purpose of the meeting.

Section 5. Quorum And Voting The Members attending a meeting shall constitute a quorum. A majority vote of the Members voting shall be an act of the Members. Members may not vote by proxy.

Section 6. Matters On Which Members Vote Members shall vote for election and removal of Directors and amendment of bylaws. Members may pass resolutions asking the Board take a particular action.

ARTICLE 4-LEADERSHIP COUNCIL

Section 1.Duties: the Leadership Council, who shall appoint the Officers, shall manage the affairs of the Friends. The Council shall have the duties and powers enumerated in the Charter under the captions "Preamble", "Powers of the Board" and "Responsibilities of the Board".

Section 2.Number and Qualifications of Directors The number of elected Council Members may vary between a minimum of fifteen (15) and a maximum of twenty-six (26) as set by the Council. In addition to elected Directors there shall be six (6) ex-officio Directors, Directors by reason of their position: 1) the General Director of the Festival, who will also serve as President of the Council, 2) the Artistic Director of the Festival, 3) the Dean of the University of Oregon School of Music and Dance, 4) a Musician Representative of the Festival's Orchestra, 5) a Musician Representative of the Festival's Chorus, and 6) Royce Saltzman and Helmuth Rilling, as Emeritus Directors.

Section 3.Terms and Election The term of office for elected Council members shall be three (3) years. A Council member may not be elected for a third consecutive term, but may be reelected following an absence on the Council of one (1) year. Also, if a Council member who in its last year of a term is also Chair, then that member may be elected to a one (1) year term to complete a two (2) year term of office as Chair.

Council Members are elected at the Annual Meeting. The Council shall endeavor to stagger the terms of its members so that each year, as near as possible, the terms of one fourth (1/4) of the members shall expire. The Council shall appoint the two (2) Musician Representatives. The Director Emeritus positions are personal to Royce Saltzman and Helmuth Rilling.

The Council shall establish procedures for the nomination of its members. The two *ex-officio* Musician Representative Council members shall be appointed by the Council, with recommendations from the General Director.

Section 4.Removal Any elected Council Member, or a member appointed by the Board to fill a vacancy may be removed, with or without cause, by a vote of Members at a meeting called for that purpose. Also, if a Council Member fails to attend three (3) consecutive Regular Meetings, or five (5) meetings during such member's current term, then the Executive Committee shall at its next meeting decide whether to recommend to the Council that it vote to remove such member. Whether or not there is a recommendation from the Executive Committee, the Council may remove such member.

Section 5.Vacancies If the number of elected members on the Council is less than fifteen (15), then the Council may appoint members until the minimum of fifteen (15) exists. Appointed members shall serve until the next Annual Meeting.

Section 6.Quorum and Action A majority of elected Council members being present at a meeting shall constitute a quorum. If a quorum is present a majority vote of all Council members present, both elected and ex-officio, shall be the action of the Board. Council members may not vote by proxy.

Section 7. Regular Meetings **Regular Meetings** of the Leadership Council shall be held at the time and place set by the Council. No other notice of the date, time, place or purpose of Regular Meetings is required.

Section 8. Special Meetings **Special Meetings** of the Leadership Council shall be held at the call of members constituting at least twenty (20) percent of elected members, or at the call of the Executive Committee. Notice of Special Meetings shall be given personally, or by telephone, mail or e-mail not less than seven (7) days prior to the Special Meeting.

Section 9. Honorary Life Directors The Leadership Council may, with the consent of the person, appoint a former Council Member as an **Honorary Life Director** recognizing exceptional service to the Friends as a former Board Director for more than one term, philanthropic support, and leadership. Honorary Life Directors' names shall be included in lists of Directors. They shall be invited to special events and be sent minutes of Board meetings. Honorary Life Directors may not vote as Leadership Council members.

ARTICLE 5-COMMITTEES

Section 1. Executive Committee The Leadership Council will create an **Executive Committee** that may make decisions of the Council between Regular Meetings and advise the Council on matters of policy. The Executive Committee shall consist of the four (4) Council members who are Officers, and, at the Council's discretion, one elected Council member. The Executive Committee shall be available to the General Director for consultation and planning, and to the Chairperson for preparation of the Council's meeting agenda.

Section 2.Other Committees The Leadership Council may create **Other Committees** composed of at least one elected member appointed by the Council. Other Committees may have members who are not Council members. The Leadership Council resolution establishing Other Committees shall include a statement of its responsibilities and term.

ARTICLE 6-OFFICERS

Section 1.Titles **Officers** of the Leadership Council shall be the **Chairperson**, the **Vice Chairperson** and the **Secretary**. No person may hold more than one office. The Board may appoint other Officers. **The President** (OBF's General Director) is an officer ex-officio.

Section 2. Qualifications and Appointment Each Officer shall be an elected Director and be appointed annually by the Board at its first Regular Meeting following the Annual Meeting. The Chairperson, Vice Chairperson and Secretary shall be appointed to two (2) year terms.

Section 3.Vacancy A vacancy of any office shall be filled promptly following the vacancy.

Section 4.Removal The Leadership Council may at any time, with or without cause, remove an Officer by an absolute majority.

Section 5.Duties The Chairperson shall preside at meetings of the Members, Leadership Council and Executive Committee, represent the Council at meetings with the administration of the University of Oregon, and be the spokesperson for the Leadership Council and Friends to the public. The Vice Chairperson shall act as Chairperson in the absence of the Chairperson. The Secretary shall, with the assistance of Festival staff, cause the preparation of the minutes of all meetings of Members, the

Leadership Council and the Executive Committee. Also, the Secretary shall ensure the authentication of records of the Friends and ensure the preparation and receipt of notices provided for in these Amended and Restated Bylaws.

ARTICLE 7-AMENDMENT OF BYLAWS

These Amended and Restated Bylaws may be amended or repealed, and new bylaws adopted by a vote of Members at a Special Meeting or Annual Meeting. Notice of such meeting shall include a copy of the proposed amendment.

CERTIFICATION OF SECRETARY

I, _____, certify that I am the duly appointed, qualified and acting Secretary of the Leadership Council and that the foregoing Amended and Restated Bylaws were duly adopted by the Members on the _____ day of _____, 20_____.

By: _____, Secretary