

# OPERA AMERICA



July	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
August	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
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June	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15

**THE YEAR  
IN REVIEW**

**AN INTERVIEW  
WITH NEA  
CHAIRMAN  
JANE CHU**

**WALLACE  
ANNOUNCES  
AUDIENCE  
INITIATIVE**

**ANNUAL FIELD  
REPORT:  
OPERA ON THE  
REBOUND**

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OPERA  
THEATRE



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# OPERA AMERICA

**WINTER 2014/2015**

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**THE COVER**

James Ty Cumbie's colorful parade of performers who appeared in member company productions from the past year: (l-r) Danielle de Niese in San Francisco Opera's *Partenope* (photo by Cory Weaver); Marcy Stonikas in Seattle Opera's *The Consul* (photo by Elise Bakketun); David Adam Moore in Beth Morrison Projects' *Soldier Songs* (photo by Noah Stern Weber); Sandra Piques Eddy in Opera Colorado's *Carmen* (photo by Matthew Staver); Lucas Meachem in San Francisco Opera's *Il barbiere di Siviglia* (photo by Cory Weaver); and Craig Colclough in Arizona Opera's *Don Pasquale* (photo by Ed Flores).

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The magazine of OPERA America — the national service organization for opera, which leads and serves the entire opera community, supporting the creation, presentation and enjoyment of opera

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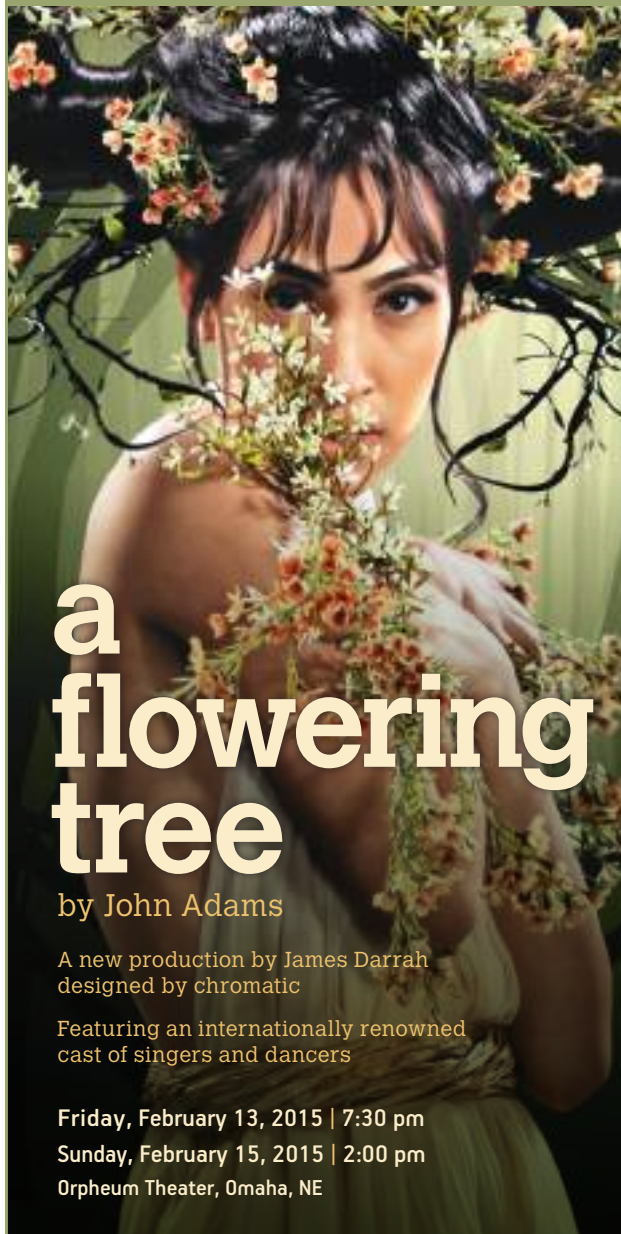
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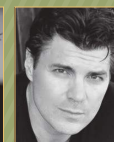
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James Darrah



Kumudha Andriana Chuchman



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HUSCH BLACKWELL

# REBOUNDED AND RESOUNDING

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“Rebound” and “reset” are terms generally used in sports and technology, but this year they apply equally to the business of opera, which continues to track our nation’s improving economy. The last several years of hardship demanded tough decisions and skilled leadership that have guided many companies back to a position of relative stability. This rebound has, in turn, allowed members to reset their focus on longer-term plans that promise to excite audiences, attract media attention and demonstrate opera’s vibrancy.

Sharing industry data has long been a hallmark of OPERA America’s service to the field. This year we expand that commitment to inform our members by incorporating the *Annual Field Report* into the winter issue of our magazine. We remain mindful of the structural challenges to the industry — and to the unique issues facing every OPERA America member — but as the *Annual Field Report* demonstrates, we are, at various levels, seeing budget surpluses, audience growth, increases in working capital, and growth in the number of productions and performances.

As this issue’s feature articles demonstrate, artistic growth continues unabated. Innovation is no longer a rare occurrence; it has become embedded in the work of our companies and the artistic process itself. Composers and librettists are exploring an inspiring, ever-widening range of styles and subjects. Each day we learn of imaginative ways our members are using new venues and leveraging new partnerships to engage audiences in their theaters and throughout their communities. The latest round of awardees in our Opera Grants for Female Composers program and the finalists in our Robert L.B. Tobin *Director-Designer Showcase* demonstrate that immensely talented artists are poised to enrich our opera experience.

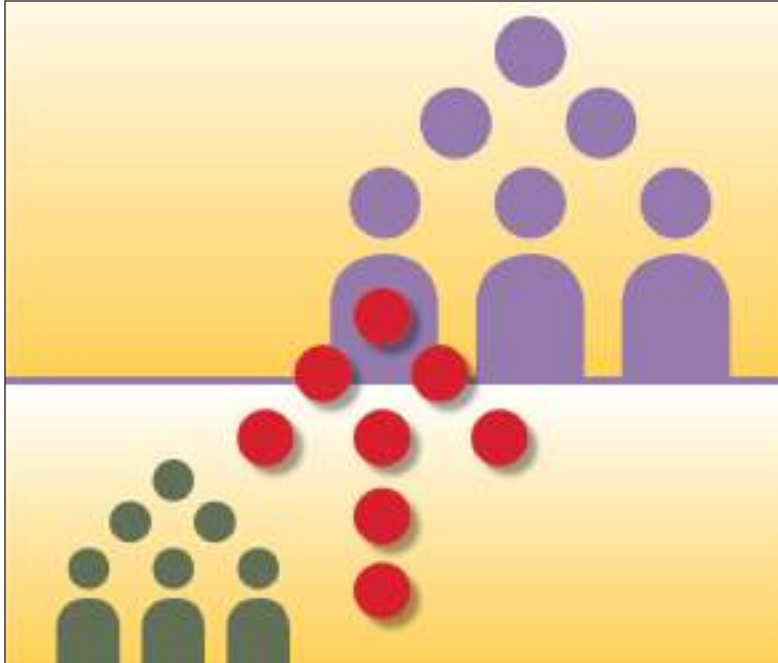
OPERA America continues to be strong, thanks to the steadfast support of our generous donors. The National Opera Center is thriving as a home for the industry. Our balance sheet is solid, even as our grant programs and activities continue to grow. We are particularly delighted by the continued support from numerous foundations and corporations that underwrite our work in the areas of governance, leadership, audience building and artist development.

There is yet another “reset” for which we are grateful: new leadership at the National Endowment for the Arts that will sustain our long and deeply appreciated partnership with the agency. Jane Chu, the new NEA chairman, whom I had the privilege of interviewing for this issue, inspired me when she spoke of the arts as the “heartbeat” of our communities. And with our cherished friend and colleague Ann Meier Baker about to assume the role of director of music and opera, we can be confident that arts service organizations will remain an essential part of the national arts funding dialogue.

Though this issue of the magazine offers a retrospective of the year that was, no report would be complete without looking ahead to the future, particularly to those important moments when OPERA America convenes leaders in the field to foster dialogue and share best practices. The New Works Forum in January, the National Trustee Forum in February and, above all, *Opera Conference 2015* in May, hosted by Washington National Opera, will provide unparalleled opportunities for learning and networking. We look forward to building on our resounding progress in realizing shared goals for our communities and our art form.

A handwritten signature in black ink that reads "Marc A. Scorca". The signature is fluid and cursive, with a long horizontal stroke at the end.

Marc A. Scorca  
President/CEO  
OPERA America



JAMES TY CUMBIER/THE NOUN PROJECT

## THE WALLACE FOUNDATION ANNOUNCES MAJOR GRANT TO BUILD ARTS AUDIENCES

**T**he Wallace Foundation has announced a six-year, \$40 million arts initiative, Building Audiences for Sustainability, designed to help outstanding performing arts organizations across the United States create programs that attract new audiences while retaining existing ones. In February, Wallace will announce the organizations that will receive grants.

Building on the success of earlier Wallace arts efforts, the new initiative aims to provide meaningful support for arts organizations whose artistic visions and missions involve building audiences. The foundation seeks to share evidence on sustaining audience gains as well as whether these gains improve the overall financial health of arts organizations.

This new Wallace initiative grows out of the information and insights gleaned during the Wallace Excellence Awards, a multiyear effort that concluded in 2014, which supported audience-

building projects at 54 visual and performing arts organizations in six cities around the country. Over a period that averaged three years, the organizations seeking to increase the size of their overall audience saw median gains of 27 percent, while those targeting growth of a specific segment saw median gains of 60 percent.

Participating organizations in Building Audiences for Sustainability will design and implement mission-driven projects to build audiences, from instituting new programming to presenting performances in novel ways or at nontraditional venues. In addition to receiving grant support for their artistic efforts, participants will receive assistance in research, data collection and organizational development.

To provide the field with findings from this initiative, Wallace has formed partnerships with seven arts service organizations that will share information through their publications, presentations, newsletters and other communications. The organizations — OPERA America, Association of Performing Arts Presenters, American Alliance of Museums, League of American

**The Wallace Foundation seeks to share evidence on sustaining audience gains as well as whether these gains improve the overall financial health of arts organizations.**

Orchestras, Dance/USA, Theatre Communications Group and Chamber Music America — have all been actively pursuing audience-building issues. ●

## COMPANIES REPORT GROWTH IN CONTRIBUTED AND EARNED INCOME

**F**or the second consecutive year, **THE DALLAS OPERA** has achieved a balanced operating budget, marking the first time in 15 years that the company has seen back-to-back balanced results. The financial stability has allowed Dallas to return to the company's traditional five-production season in 2014–2015 and to diversify programs to cover a wider range of repertoire and commissions. General Director and CEO Keith Cerny attributed the success to the leadership of three successive board chairs — Kern Wildenthal, Don Winspear and T. Peter Townsend — and the efforts of the board's vice president for development, Holly Mayer.

**OPERA COLORADO** continues to experience significant financial success following a restructuring of its operating procedures in January 2013. In 2012, Opera Colorado incurred an operating deficit due to lower-than-anticipated ticket sales and fundraising shortfalls. In response, the company downsized to a two-production season, reduced overhead, postponed the premiere of Lori Laitman and David Mason's *The Scarlet Letter*, and launched a \$1.2 million fundraising campaign. As a result, Opera Colorado has ended the 2013 and 2014 fiscal years with surpluses of \$98,000 and \$231,000 respectively. These funds have been reinvested in the

company's programs and used to pay down debt incurred in 2012.

At its annual meeting in October, the **CANADIAN OPERA COMPANY** reported endowment growth as well as growing attendance figures. Average attendance increased four percent over the past year to reach 94 percent of capacity, while combined fundraising revenue increased by \$12.6 million, including \$3 million to the company's endowment. The endowment has increased in size from \$18.8 million in 2008 to \$34 million in 2014. However, the company did post an expected revenue shortfall of \$952,000. To eliminate the deficit, the COC has reduced the number of productions from seven to six for the 2014–2015 season and has implemented new marketing and pricing strategies.

Dr. Ernest C. and Sarah Butler of Austin have endowed the chorus master chair of **HOUSTON GRAND OPERA** with a gift of \$1 million.

They made a previous \$1 million gift to HGO in 2013 to endow the concertmaster chair. As a result of these gifts, HGO has now raised more than \$163 million toward a campaign goal of at least \$165 million by December 31, 2014. The largest fundraising effort ever launched in the history of the performing arts in Houston, HGO's campaign is co-chaired by Houston business leaders John Scott Arnoldy and Albert Chao.

**PALM BEACH OPERA** has received a \$500,000 matching grant from longtime supporters Sandra and Paul Goldner to enhance and grow education programs in Palm Beach County, all of which are free for participants. The Goldners have been involved with Palm Beach Opera since 2007, Sandra as a member of the PBO Guild and Paul as a member of the company's board of directors. PBO currently has three education programs: Concerts in the Classroom, for grades K–12; Opera Rehearsal 101, which allows

middle and high school students to attend dress rehearsals; and PBO Studio, an apprentice program for high school juniors and seniors who plan to pursue music degrees in voice at the college level.

**THE SANTA FE OPERA** reported \$8.7 million in ticket sales and attendance of more than 78,000 during the 2014 season. This marked the second highest season for ticket revenue in the company's history. The company reached \$8.5 million in annual operating support for the 2014 fiscal year, which ended on September 30. This figure marks the highest amount of annual contributions in the company's history. Santa Fe's Setting the Stage campaign, an ambitious three-year renovation and building program focused on the public and backstage areas of the theater, began in early September. The project is a \$35 million undertaking of which \$26.3 million has already been raised. ●

## FLORENTINE OPERA PARTNERS WITH SOLTI FOUNDATION FOR CONDUCTOR TRAINING

In a collaboration designed to advance the careers of promising young conductors, Milwaukee's **FLORENTINE OPERA COMPANY** and The Solti Foundation U.S. have announced a new pilot residency project. For the 2014–2015 inaugural season, Joseph Rescigno, Florentine's principal conductor and artistic advisor, will mentor Vladimir Kulenovic and Sean Newhouse with three-week residencies involving coaching and conducting opportunities for orchestra and chorus rehearsals.

Vladimir Kulenovic is associate conductor of the **UTAH SYMPHONY | UTAH OPERA**, resident conductor of the Belgrade Philharmonic Orchestra and music director of the Lake Forest Symphony.

His residency was held in October as part of Florentine's new production of *The Flying Dutchman*. Sean Newhouse, who has served as assistant conductor of the Boston Symphony Orchestra, associate conductor of the Indianapolis Symphony Orchestra and assistant conductor for **BOSTON LYRIC OPERA's** *The Flying Dutchman*, will have his residency in May in conjunction with Florentine's new production of *L'elisir d'amore*.

The Solti Foundation U.S. was established to honor the legendary orchestra and opera conductor Sir Georg Solti. Since 2004, the foundation has awarded over \$284,000 in grants to American conductors. ●



MICHAEL LUTCH



KATHY WITTMAN

**Top:** Sean Newhouse, who will have his residency at Florentine Opera in May, conducts the Boston Symphony Orchestra. **Bottom:** Vladimir Kulenovic conducts a rehearsal of Florentine Opera's *The Flying Dutchman*.

## THE CRANE SCHOOL PRODUCES THREE CONTEMPORARY WORKS

In November, the Crane Opera Ensemble at SUNY Potsdam presented the first productions of three new works that were awarded the 2014 Domenic J. Pellicciotti Opera Composition Prize. The operas were chosen from a pool of 74 submissions from the U.S., Canada and Europe. The winning composer-librettist teams then worked with Crane students and faculty to stage their operas.

The Pellicciotti Prize was founded by Crane alumnus Dr. Gary C. Jaquay to honor his life partner, Domenic J. Pellicciotti, an ardent fan of opera. The award seeks to encourage and acknowledge the creation of new operas that explore themes relating to tolerance, inclusion and diversity. The \$20,000 prize, which is divided among the winning teams, will be awarded every four years, with each selected opera to be presented at Crane.

The first round of this competition focused on works relevant to the LGBTQ community. This year's featured winner, which was performed in full, was *A Letter to East 11<sup>th</sup> Street* by Martin Hennessy and Mark Campbell. The Crane Opera Ensemble also performed one act from each of the other two winners: *In a Mirror, Darkly* by Christopher Weiss and S. O'Duinn Magee, and *The Fox and the Pomegranate* by Matt Frey and Daniel J. Kushner.

The productions were accompanied by a matinee performance for high school students, a public composer-librettist forum and a panel discussion on the role of new works in higher education. Among the panelists were Lawrence Edelson, artistic and general director of **OPERA SARATOGA** and founder of **AMERICAN LYRIC THEATER**; Laura Lee Everett, director of artistic services at **OPERA AMERICA**; Melissa Wegner, associate director of the Metropolitan Opera National Council Auditions; Copeland Woodruff, director of opera studies at Lawrence University; and Darren K. Woods, general director of **FORT WORTH OPERA**. ●



CARLEEN GRAHAM



MELANIE KIMBERL JACO/MATERTOWN DAILY TIMES



ALEXANDRA JACOBS WILKE

**Top:** Martin Hennessy and Mark Campbell's *A Letter to East 11<sup>th</sup> Street*, with Cameron Brownell (Rick Driscoll) and Heather Ferlo (Susan Bollinger). Conducted by Kirk Severtson and directed by Carleen Graham. Scenic design by Ann Beyersdorfer, costume design by Alexis Foster and lighting design by E. Tony Lathroum. **Bottom left:** *In a Mirror, Darkly* by Christopher Weiss and S. O'Duinn Magee, with (l-r) Edith Grossman (Elaine), Helena Waterous (Moirra) and Daniel Kringer (Jacques). Conducted by Kirk Severtson and directed by Carleen Graham. Scenic design by Ann Beyersdorfer, costume design by Alexis Foster and lighting design by E. Tony Lathroum. **Bottom right:** A rehearsal of Matt Frey and Daniel J. Kushner's *The Fox and the Pomegranate*, with (l-r) Kathleen Kane (Nate), Sarah Visnov (Meg) and Jacob James (Ari).



JEFF ZMANIA

**Correction:** A caption that appeared at the top of page 27 of the fall issue misidentified the singers. They are the 2013–2014 Florentine Opera Studio Artists, sponsored by Glen and Claire Hackmann: (l-r) Pablo Siqueiros, Julie Tabash, Erin Gonzalez and Aaron Short.



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# FDA

Mariinsky II Opera House, St Petersburg, Russia



KATERINA GOODE

**YUVAL SHARON**

**Yuval Sharon**, founder and artistic director of **THE INDUSTRY**, has been awarded the Götzt Friedrich Prize for opera direction for his production of John Adams' *Doctor Atomic* at the Staatstheater Karlsruhe.



CANDACE DICARLO

**JENNIFER HIGDON**

Composer **Jennifer Higdon** received the 2014 Distinguished Arts Award from the Pennsylvania Council on the Arts, presented by Governor Tom Corbett and First Lady Susan Corbett. Higdon's debut opera, *Cold Mountain*, will premiere at **THE SANTA FE OPERA** in August. It is a co-commission of The Santa Fe Opera, **OPERA PHILADELPHIA** and **MINNESOTA OPERA**.



ARIELLE DONESON

**CHRISTINE GOERKE**

*Musical America* has named **Christine Goerke** its 2015 Vocalist of the Year in recognition of her outstanding performances of the Wagner and Strauss repertoire. Additional awards went to director Peter Sellars, composer John Luther Adams, conductor Gianandrea Noseda and violinist Lisa Batiashvili.



COURTESY OF LONG BEACH OPERA

**ANDREAS MITISEK**

**Andreas Mitisek**, artistic and general director of **LONG BEACH OPERA** and general director of **CHICAGO OPERA THEATER**, has been selected to participate in National Arts Strategies' 2014–2015 Chief Executive Program. This 18-month course brings together arts leaders whose organizations work on creative place-making initiatives.

## IN MEMORIAM

**Magda Olivero**, whose singing career spanned seven decades, died on September 8 at age 104. She made her U.S. debut in 1967, singing *Medea* at The Dallas Opera, and her Metropolitan Opera debut — at age 65 — in *Tosca*.

**Tibor Rudas**, the Hungarian-born impresario, died on September 8 at age 94. Best known for conceptualizing the “Three Tenors” concerts, he introduced opera to an audience unprecedented in size and diversity.

Conductor **Christopher Hogwood** died on September 24 at age 73. A pioneer in the field of authentic performance, Hogwood made his operatic debut in 1983 conducting *Don Giovanni* at Opera Theatre of Saint Louis.

**Patricia Carroll Compton**, who served on OPERA America's board of directors from 2003 to 2007, died on

October 5 at age 82. After receiving her bachelor's degree in music composition from Goucher College, Compton worked for Chappell Music Publishers and RCA Victor Records. Later in her career, she held management positions at several regional opera companies, including Opera Festival of New Jersey. In 1996, she became executive director of Opera North, a position she held until 2006.

Composer **Stephen Paulus** died on October 19 at age 65. Best known for *The Postman Always Rings Twice*, one of four operas he composed for Opera Theatre of Saint Louis, Paulus wrote nearly 60 orchestral scores, 10 operas and 150 choral works. Over the course of his 40-year career, Paulus enjoyed fruitful collaborations with Minnesota Opera, Minnesota Orchestra and the Dale Warland Singers.

Director and choreographer **Donald Saddler** died on November 1 at age 96. Saddler devoted more than 60 years to film and theater, with opera credits including *Die Fledermaus* for Washington National Opera, *La Périchole* for the Metropolitan Opera, and *The Student Prince* and *The Merry Widow* for New York City Opera.

Stage designer **Johan Engels** died on November 7 at age 62. In addition to his work for ballet and theater, Engels created opera productions for stages around the world, including Los Angeles Opera, the Canadian Opera Company, Covent Garden and the Vienna State Opera. His designs for Lyric Opera of Chicago's new *Ring* cycle will be seen beginning in the 2016 season. ●



**PATRICIA CARROLL COMPTON**



SHAROLYN HAGEN PHOTOGRAPHY

**STEPHEN PAULUS**

# PEOPLE

CHORUS AMERICA



The National Endowment for the Arts has selected **Ann Meier Baker** as director of music and opera. She currently serves as CEO of Chorus America. “Ann has been an instrumental partner in building the strength of all arts service organizations, from her leadership at past

**ANN MEIER BAKER**

National Performing Arts Conventions to her continuing presence as a wonderful colleague,” said Marc A. Scorca, president/CEO of OPERA America. “The opera community is delighted by the NEA’s appointment and we look forward to working with Ann in her new role.”

**Nina Archabal** has been appointed as interim general director of **MINNESOTA OPERA**, succeeding **Kevin Ramach**, who resigned as president and general director in November.

**Jose Maria Condemni** has resigned as artistic director of **OPERA SANTA BARBARA**, effective June 30, 2015.

**John Gabriel** has assumed the newly created position of director of education and school programs at **SAN DIEGO OPERA**.

**David Gockley**, general director of **SAN FRANCISCO OPERA**, will retire at the end of the 2015–2016 season.

**MICHIGAN OPERA THEATRE** has appointed **Alan H. Harrison** to the newly created position of chief patron officer.

**OPERA IN THE HEIGHTS** has named **Allison Hartzell** as executive director.

**CHICAGO OPERA THEATER** has appointed **Oliver Ionita** as director of development.

**SKYLIGHT MUSIC THEATRE** announced that **Amy S. Jensen**, who has served as managing director since 2009, will leave the company at the end of this season.

The **CANADIAN OPERA COMPANY** has selected **Steven Kelley** to serve as chief communications officer, a newly created position.

**SAN FRANCISCO OPERA** has appointed **Daniel Knapp** as director of production.

**Pamela A. Pantos** has left her post as executive director of **OPERA NORTH** to become vice president at Arts Consulting Group.

**ANNAPOLIS OPERA** has named **Kathy Swekel** as general manager.

**FLORIDA GRAND OPERA** has renewed Music Director **Ramón Tebar**’s contract through the 2015–2016 season.

Tanglewood Music Center has named soprano **Dawn Upshaw** as head of its Vocal Arts Program.

**Emmanuel Villaume**, music director of **THE DALLAS OPERA**, has been appointed to a three-year term as music director of the PKF – Prague Philharmonia, effective September 1, 2015. ●



## Iain BELL *A Christmas Carol* World Premiere Houston Grand Opera December 5-21

Iain Bell’s operatic adaptation of this festive classic is a setting of Charles Dickens’ own one-man version of the novella, which the author frequently performed throughout his career.

With a captivating score for 15-player chamber orchestra and libretto by renowned film and stage actor Simon Callow, the opera is a true tour de force – a one man show – with Jay Hunter Morris as the narrator in the World Premiere at HGO.

*Image by Pattima Singhalaka*

## OPERAS FOR THE HOLIDAYS

Mark Adamo	<b>Becoming Santa Claus</b> (Dallas Opera) coming December 2015
Seymour Barab	<b>Only a Miracle</b> (1985)
Howard Blake	<b>The Snowman Stage Show</b> (1993)
Rutland Boughton	<b>Bethlehem</b> , Choral Drama (1915)
Dave Brubeck	<b>La Fiesta de la Posada</b> (1975)
Geoffrey Bush	<b>A Christmas Cantata</b> (1947)
Albert Hague	<b>How the Grinch Stole Christmas!</b> (1966)
Robert Kapilow	<b>Chris van Allsburg’s Polar Express</b> (1997) <b>Elijah’s Angel</b> (1998)
Gian Carlo Menotti	<b>Amahl and the Night Visitors</b> (1951)
Douglas Moore	<b>The Greenfield Christmas Tree</b> (1962)
Thea Musgrave	<b>A Christmas Carol</b> (1978-1979)
John Jacob Niles	<b>Mary the Rose</b> , A Miracle Play for Christmas (1955)
Rachel Portman	<b>The Little Prince</b> (2003)



OPERAS from **G. SCHIRMER/AMP**  
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# AN INTERVIEW WITH JANE CHU

Before being appointed chairman of the National Endowment for the Arts in June, Jane Chu served as president and CEO of the Kauffman Center for the Performing Arts in Kansas City, home of Lyric Opera of Kansas City as well as the ballet and symphony. As she transitions from local arts leadership to shaping national arts policy, Chu spoke with OPERA America President/CEO Marc A. Scorca about how the arts serve as the heartbeat of our communities.

**MAS:** The National Endowment for the Arts is now in a different place than it was when it was established in the 1960s. Back then it was a catalyst for creating infrastructure — theater and dance companies, opera companies and symphony orchestras. Today the agency is focused on catalyzing demand for what is produced. How do you see the agency adjusting to this new balance?

**“The arts enrich the renaissance of communities of all sizes, of large cities and smaller towns and even rural areas. The arts have the ability to bring people together and connect and create a heartbeat.”**

**JC:** It is a great opportunity for those of us who are cultural providers to make sure that all Americans understand that the arts are an essential component of our everyday lives. We want to stress that the arts are not in a silo. They are not isolated. Infrastructure is a key piece of

communicating this message, and we who provide opportunities for audiences to experience the arts are an important channel. So, in relation to supply and demand, it is “both/and” as opposed to “either/or.”

**MAS:** When it comes to understanding the impact of the arts on communities, Kansas City is a stunning example. You led the construction of its performing arts center, one of the most beautiful in the United States. Kansas City is also home to wonderful spaces for galleries and other arts activities. What led to the development of this environment?

**JC:** I like to call it the “front porch effect.” If people sweep their front porch, people down the street say, “If he is sweeping his front porch, I should sweep mine too.” That was the dynamic that happened in

Kansas City. A number of entities, such as the Nelson-Atkins Museum and the Power & Light District, were developing activities and programs and soon you had people moving downtown. The arts start this kind of vitality. They provide people with things to do. They enrich the renaissance of communities of all sizes, of large cities and smaller towns and even rural areas. The arts have the ability to bring people together and connect and create a heartbeat. It might be, as in Kansas City, a renaissance of buildings and programs, but it also might be a deeper level of understanding the arts or what we know the arts can provide, which is an understanding of yourself.

**MAS:** What are the roles of government agencies in creating and stimulating this heartbeat?

**JC:** We at the NEA are always asking, “What does the environment look like? How can we leverage the grants we award to spark vitality on a larger level?” And “leverage” is the key word. NEA grants, as many people know, require a one-to-one match in terms of funding, so that automatically brings in other funders and other partners. But after examining our own grants at the NEA, we see that the match is more like one-to-nine or one-to-ten. So, how can government funding spark that heartbeat of vitality? By providing leverage that brings people together. That is where the NEA can be very effective.

**MAS:** Place-making is an important theme in philanthropy today, with arts activities in new and unusual places helping to connect people to one another, to themselves and to their communities. What does this emphasis on place-making mean to you?



**“I love opera because of its ability to tell a story that people can identify with. And those stories are broadening. They are a way for people to understand the stories of life.”**

**JC:** It is a vital piece. When I think about place-making I automatically want to set the context. When you look at downtown areas in the 1930s, 1940s and 1950s, the central hub of the downtown area was “Main Street.” People would go there for retail and transactions, for manufacturing and exchanges. People lived there. Then came highways and more people had automobiles. They could move to the suburbs and have more land, bigger houses. That shift left the downtown areas remote and isolated. Without enough activity going on, they became desolate. Over time, even though people had more opportunities to be mobile, there was a sense of a loss of place, of that hub. But when people realized that the arts can bring a pulse to the whole metropolitan area, no matter where they live, the place-making concept came about. People are looking for a great experience, the ability to be connected, the ability to belong, and the arts provide those opportunities.

**MAS:** The media has covered the controversy surrounding the Metropolitan Opera production of *The Death of Klinghoffer*. Too often opera is stereotyped as telling stories of star-crossed lovers and jealous, enraged rivals. Here opera is on the front page, resonating with the world we live in. What is your feeling about our obligation to support what might be considered difficult art — to go beyond that which is “easy”?

**JC:** At the Kauffman Center for the Performing Arts, we were mindful of the continuum of the ways people can engage with the arts. It isn’t just “easy” versus “challenging.” It is, again, a “both/and” situation, and that is the mindset that we want to have in creating an environment for people to have these opportunities. I love opera because of its ability to tell stories that people can identify with. And those stories are broadening. They aren’t, as you say, just stereotyped stories of “star-crossed lovers.” They are a way for

**“We want to show on a number of different levels how valuable the arts are to our everyday lives.”**

people to understand the stories of life. That is what opera has such a great opportunity to do.

**MAS:** We are thrilled with the appointment of Ann Meier Baker as the NEA’s director of music and opera. It is not common for someone to go from a national service organization to the NEA, and I am wondering whether you see in this a strengthened partnership between the agency and arts service organizations?

**JC:** We do see it as an important partnership. We are all in this together to create an environment where people have an opportunity to be engaged, and arts service organizations are a critical piece of that.

**MAS:** You have worked with public officials at many levels. Now you are in Washington. Are there messages that resonate equally well in city halls, state legislatures and the nation’s capital? Messages about why the arts are worthy of support from government?

**JC:** There are several messages. We want to show on a number of different levels how valuable the arts are to our everyday lives. There has been an emphasis on the economic impact of the arts. To give an example, the most recent numbers from the Bureau of Economic Analysis show that the arts and culture sector comprises more than 3.2 percent of the GDP for the nation, which is roughly half a trillion dollars. That is a significant impact, even more than the travel and tourism industry contribute. Another example shows the transformation when the arts are connected with human development.

The NEA has a program with the Walter Reed National Military Medical Center that provides music therapy and creative writing therapy for service members who have experienced traumatic brain injuries and other psychological health issues. The program has been so transformational that it is now part of their standard care. It is just as important to send out examples related to arts education and to the intersection of art and technologies. There are different ways that the arts play a key role in our lives, as well as just sitting back and enjoying art for art’s sake. The arts cover so many different fronts. We can celebrate all of them.

**MAS:** Arts education has had a rough 20 years. It has been excised from school agendas because of finances and time devoted to the so-called “core curriculum.” How do you plan to work with the Department of Education to seek partnerships that can advance the centrality of the arts in the education of young people?

**JC:** We see a critical role for arts education because we are raising our next generation of creative and innovative thinkers. Creativity helps us solve problems in different ways. It keeps us from getting stuck in the ways we have always done things before. So, yes, we are having active conversations about the role of the arts in the school curriculum, applied alongside other subjects, as well. One of the things the NEA will do on a very tangible level is that while we are continuing to give grants to support students and learning, as well as professional development for teachers and arts education, we also will focus on

the whole environment. By that I mean we will support the shared landscape for school systems and community arts providers. We think that will also help to make sure that everyone is on board with the importance of arts education.

**MAS:** Finally, who brought you to your first opera?

**JC:** I was a music major in college — I was trained in piano and I play the flute, as well — so my first understanding of opera was through music history. I was immersed in all the nuances of productions of the classic operas. I continue to be very interested in it. What heartens me are examples of how opera tells stories of basic human development — who we are, our everyday stories — on a very big scale. The other day I was in a taxi and somehow got in a conversation with the driver about opera. He loved opera. He got into it simply because his wife wanted to go. I asked him what his favorite operas were and he didn’t know any of the names, so I asked him to tell me the stories. I understand enough of the repertoire to be able to pin down which opera he was talking about. As he began to unfold the story, it was clearly *La bohème*. So, you know, operas can touch so many different people on so many different levels. It is heartening because I think opera has the opportunity to really hit home with how we live, let alone the beauty and the quality of how it is produced — the singing, the music, the choreography. It is a replication of how we live our lives on a bigger scale with far more drama, but it still attends to things we understand in a basic way in our everyday lives. ●

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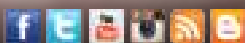


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# 2014 YEAR IN REVIEW

**I**t can now be safely said that opera no longer belongs in the opera house — well, not just the opera house. After a decade of innovation beyond the proscenium, opera now flourishes equally well in intimate venues and stadiums, in public spaces and private homes, through satellite broadcasts and on mobile devices. It belongs anywhere performers can go, and in any form audiences will engage with it. Opera is no longer fixed in space. Opera makes its own place.

American opera singers, who once upon a time fought their way onto international stages, are

now global media ambassadors. The 2014 Super Bowl drew 111.5 million viewers, and opera was there: Renée Fleming, a Pennsylvania native, sang *The Star-Spangled Banner*. Game Seven of the 2014 World Series reached 23.5 million viewers, and opera was there: Joyce DiDonato, a Kansas native, sang our national anthem. From San Francisco to Dallas to Washington, D.C., opera is live-streamed to playing fields where opera lovers and opera discoverers sit side-by-side.

Opera no longer belongs just in the back pages of newspapers, among the reviews and entertainment listings. Opera can now command the front page, engaging civic issues of local, national and international scope. **SAN DIEGO OPERA**, on the brink of closure, generated headlines when it averted dissolution by galvanizing local opera lovers and national opera leaders to reimagine its future and establish a more sustainable business model. **THE METROPOLITAN OPERA**, with its new production of *The Death of Klinghoffer*, sparked a vociferous international dialogue on the role of opera in tackling controversial issues. **OPERA THEATRE OF SAINT LOUIS** positioned itself as a civic leader when it collaborated with Jazz St. Louis and other organizations for “A Concert for Peace and Unity,” an appeal for social harmony in the wake of violence in Ferguson, Missouri.

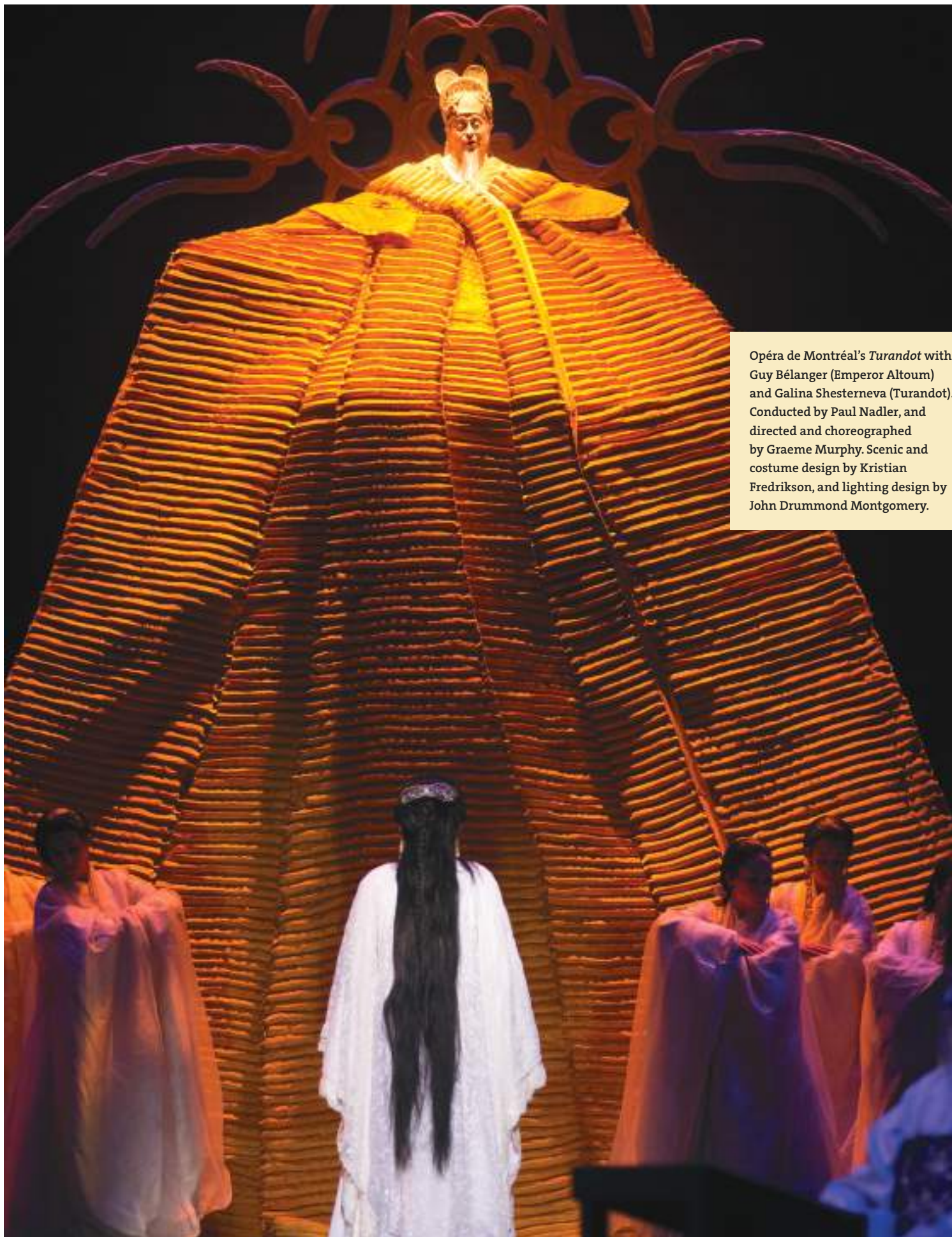
Opera companies continue to present classics from the European canon, masterpieces from the 20<sup>th</sup>- and 21<sup>st</sup>-century repertoire, and beloved works from the American musical theater, but they increasingly look to contemporary American composers and librettists to generate large-scale operas that resonate with the past and the present. This year, **HOUSTON GRAND OPERA**, **LYRIC OPERA OF CHICAGO**, **THE DALLAS OPERA**, **MINNESOTA OPERA** and **CINCINNATI OPERA** all announced major commissions and co-productions that will resonate for years. Puccini, Verdi and Mozart have nothing to fear, nor do Gershwin, Bernstein, Sondheim and Floyd, but they are increasingly enjoying the good company of John Adams, Mark Adamo, Kevin Puts, Jake Heggie and Ricky Ian Gordon, whose works, both in number of productions and performances, continue to rise on the charts. Prolific American librettists are also forging their own brands: Gene Scheer, Mark Campbell, Terrence McNally and Royce Vavrek have established themselves as integral members of the operatic landscape.

A terrain long dominated by men is now seeing the emergence of the female voice. Pulitzer Prize-winning composer Jennifer Higdon’s opera *Cold Mountain*, with a libretto by Gene Scheer based on Charles Frazier’s novel, is a triple co-commission poised for an August premiere at **THE SANTA FE OPERA**, with performances to follow at **OPERA PHILADELPHIA** and Minnesota Opera. Additional seeds have been planted by OPERA America through its Opera Grants for Female Composers program, launched with Discovery Grants to individuals. One such grant was awarded to Laura Kaminsky for *As One*. With a libretto by Mark Campbell and Kimberly Reed,

## THE FIELD

*Continued on page 18*





Opéra de Montréal's *Turandot* with Guy Bélanger (Emperor Altoum) and Galina Shesterneva (Turandot). Conducted by Paul Nadler, and directed and choreographed by Graeme Murphy. Scenic and costume design by Kristian Fredrikson, and lighting design by John Drummond Montgomery.



Monteverdi's *Il combattimento di Tancredi e Clorinda* as performed by Gotham Chamber Opera in The Metropolitan Museum of Art's Emma and Georgina Bloomberg Arms and Armor Court, with (l-r) Craig Verm (Tancredi), Beth Clayton (Clorinda) and, in plaid skirt, Abigail Fischer (Testo). Conducted by Neal Goren and directed by Robin Guarino. Scenic design by Andromache Chalfant, costume design by Gabriel Berry, lighting design by Jane Cox and choreography by Bradon McDonald.

Long Beach Opera's *The Death of Klinghoffer* by John Adams and Alice Goodman, with (l-r) Alex Richardson (Molqi), Roberto Perlas Gomez (Rambo), Robin Buck (Leon Klinghoffer) and Suzan Hanson (Marilyn Klinghoffer). Conducted by Andreas Mitisek and directed by James Robinson. Scenic design by Allen Moyer, costume design by James Schuette, lighting design by Christopher Akerlind and video design by Gregory Emetaz.



KEITH IAN POLAKOFF

Beth Morrison Projects and HERE's world premiere of *Thumbprint* by Kamala Sankaram and Susan Yankowitz at the PROTOTYPE Festival, with (l-r) Theodora Hanslowe (Mother), Kamala Sankaram (Mukhtar), Leela Subramaniam (Annu) and Kannan Vasudevan (Shakur). Conducted by Steven Osgood and directed by Rachel Dickstein. Scenic design by Susan Zeeman Rogers, costume design by Kate Fry, lighting design by Jeanette Yew, and video design by Shaun Irons and Lauren Petty.



NOAH STERN WEBER



Madison Opera's *Tosca* with Nmon Ford (Scarpia) and Melody Moore (Tosca). Conducted by John DeMain and directed by A. Scott Parry. Scenic design courtesy of Seattle Opera, costume design by Andrew Marlay and Heidi Zamora, and lighting design by John Frautschy.

As *One* was brought to life in September by **AMERICAN OPERA PROJECTS** at the Brooklyn Academy of Music and is now scheduled for performances in Logan, Utah, and the University of California at Berkeley.

Developing new work is no longer a sideline or fringe event; it has become part of the mission of companies of all sizes. Opera Philadelphia and **WASHINGTON NATIONAL OPERA**, no less than **BETH MORRISON PROJECTS**

or **THE INDUSTRY**, have solidified the developmental process with residencies and workshops that enable composers, librettists and directors to bring their stories to fruition without the high-wire risk of full productions. These incubators are now generating works that gain traction. *The Long Walk*, commissioned and developed by **AMERICAN LYRIC THEATER**, will have its world premiere at **OPERA SARATOGA** next summer.

The opera, by Jeremy Howard Beck and Stephanie Fleischmann, is based on the book by Brian Castner. *Dog Days*, by David T. Little and Royce Vavrek, was nurtured by Beth Morrison Projects and will soon be seen by the audiences of **FORT WORTH OPERA** and **LOS ANGELES OPERA**.

Innovation requires artistry, but it also requires an investment of time and money with a view toward the long term. Even as companies continue



DES MOINES METRO OPERA

Des Moines Metro Opera's *Dead Man Walking* by Jake Heggie and Terrence McNally, with David Adam Moore (Joseph De Rocher). Conducted by David Neely and directed by Kristine McIntyre. Scenic design by R. Keith Brumley, costume design by Jonathan Knipscher and lighting design by Barry Steele.



KEN HOWARD

Opera Theatre of Saint Louis' world premiere of *27* by Ricky Ian Gordon and Royce Vavrek, with Elizabeth Futral (Alice B. Toklas) and Stephanie Blythe (Gertrude Stein). Conducted by Michael Christie and directed by James Robinson. Scenic design by Allen Moyer, costume design by James Schuette and lighting design by James F. Ingalls.

to recover from the economic shock of 2008, which required many to reduce the number of productions or performances, new models of sustainability have emerged, to which alternative forms and forums contribute. A chamber opera in a black box theater, a collaboration with an art museum and a full-on *Aida* all contribute to building a viable portfolio of earned and contributed revenue.

Opera Theatre of Saint Louis, which performs in a unique and intimate venue,

last season presented the premiere of *Champion*, the story of ill-fated boxer Emile Griffith, by Terence Blanchard and Michael Cristofer, and this season offered *27*, an exploration of the life of Gertrude Stein and Alice B. Toklas by Ricky Ian Gordon and Royce Vavrek. Since 2013, OTSL's subscription sales have doubled, with new households now accounting for 26 percent of its audience. Lyric Opera of Chicago's American Musical Theater Initiative continues to broaden

its audience base. More than 25 percent of tickets for the 2013–2014 season were purchased by people attending Lyric for the first time. Of that new-to-Lyric total, more than 40,000 were *The Sound of Music* ticket buyers.

Major gifts from individuals emerged at companies of all sizes, for purposes of all kinds. Houston Grand Opera received \$1 million to endow its chorus master chair. The Dallas Opera and **PALM BEACH OPERA** each received

generous challenge grants (\$2.5 million and \$500,000 respectively) to support education. A gift of \$600,000 to **TULSA OPERA** will be acknowledged with naming rights to its music library. Foundations also continue their support of opera: The Andrew W. Mellon Foundation awarded \$750,000 each to Houston Grand Opera and Minnesota Opera to support multiple new productions. The Wallace Foundation unveiled a \$40 million initiative to build audiences for the arts, with opera a key focus of their research.

A fickle global economy cannot be controlled by our shared passion for opera, but audiences and contributors can be cultivated to reward artistic success. The breathless pace of emerging entertainment options cannot be restrained, but that need not diminish our commitment to telling stories relevant to our lives that resonate in our hearts.

And isn't it there where opera truly belongs? ●

— Matthew Sigman

Michigan Opera Theatre's *A View from the Bridge* by William Bolcom, Arnold Weinstein and Arthur Miller, with (l-r) Jonathan Lasch (Marco), Beverly O'Regan Thiele (Beatrice), Kim Josephson (Eddie), Kiri Deonarine (Catherine) and Eric Margiore (Rodolpho). Conducted by Suzanne Mallare Acton and directed by Tazewell Thompson. Scenic and costume design by Robert O'Hearn and lighting design by Kendall Smith.



JOHN GRIGALITIS, MICHIGAN OPERA THEATRE

Opera Idaho's production of *Gianni Schicchi* with (front row, l-r) Alagio Laurino (Maestro Spinelloccio), Marcus Shelton (Rinuccio), Michiko Miller (La Ciesca), Michele Detwiler (Buoso Donati), Rebecca Pearce (Nella) and Jason Detwiler (Gianni Schicchi), and (back row, l-r)

Adam Wade Duncan (Gherardo), Richard Burgess Block (Betto di Signa) and Michal Jarolimek (Marco). Conducted by Michael Porter and directed by Cindy Sadler. Scenic design by Fran Maxwell, costume design by Rebecca Hoffman and lighting design by Raquel Davis.



DAVNA ANDERSON



Fort Worth Opera's production of *With Blood, With Ink* by Daniel Crozier and Peter M. Krask, with Audrey Babcock (Countess Maria Louisa) and Vanessa Becerra (Young Sor Juana). Conducted by Timothy Myers and directed by Dona D. Vaughn. Scenic design by Erhard Rom, costume design by Austin Scarlett and lighting design by Sean Jeffries.

EILEEN APPEL



Vancouver Opera and Pacific Opera Victoria's co-production of *Albert Herring* by Benjamin Britten and Eric Crozier, with (l-r) Peter McGillivray (Mr. Gedge), Melanie Krueger (Miss Wordsworth), Sally Dibblee (Lady Billows), Susan Platts (Florence Pike), Michael Colvin (Mayor Upfold) and Giles Tomkins (Superintendent Budd). Conducted by Leslie Dala and directed by Glynis Leyshon. Scenic and costume design by Patrick Clark and lighting design by Michael Walton.

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# 2014 YEAR IN REVIEW OPERA AMERICA

In 2014, OPERA America continued its mission to serve opera companies, artists and audiences throughout North America. While advocating for opera on a national level, OPERA America also worked with its members to achieve local goals and respond to the needs of their communities. The results succeeded in strengthening collaboration, reinforcing leadership, inspiring artistic excellence and engaging audiences, all in the service of advancing a thriving art form.

OPERA America continued to enhance its role in promoting communication among its members, bringing together professionals to address topics that affect the entire field. In addition to facilitating communications via digital media, OPERA America convened Forums at which representatives from the field explored topics such as marketing, singer training and education. These gatherings provided a much-needed arena for opera company staff to discuss common

James Buckhouse of Twitter  
delivered a talk on user experience  
(UX) at *Opera Conference 2014* in  
San Francisco.

JERRY PLACKEN/MEYER SOUND

issues, share best practices and offer support to one another.

The spirit of collaboration and open dialogue was exemplified by *Opera Conference 2014*, hosted in June by **SAN FRANCISCO OPERA**. The event attracted more than 600 individuals from over 200 organizations, setting an all-time attendance record. Conference discussions centered on ways of engaging new audiences and engendering interest in the art form — topics to be revisited and reframed at *Opera Conference 2015*, hosted by **WASHINGTON NATIONAL OPERA**, which will examine opera's civic impact.

In addition to catalyzing collaboration among today's working professionals, OPERA America also continued initiatives

designed to bolster future leadership at opera companies nationwide. Fourteen promising professionals were selected to participate in the third annual Leadership Intensive, sponsored by American Express. This unique program brought together experts from development, artistic administration, education and other fields to participate in leadership-building seminars at the National Opera Center as well as focused sessions at *Opera Conference 2014*.

OPERA America has also made it a priority to fortify board leadership at member companies, ensuring that the field is steered with long-term viability in mind. In addition to hosting the National Trustee Forum,

which allowed trustees to share governance strategies, OPERA America provided board members with onsite consultations and benchmarking reports to help them evaluate the state of their companies. To celebrate exemplary board leadership, the annual National Opera Trustee Recognition Program, sponsored by Bank of America, identified five outstanding leaders who serve on the boards of Professional Company Members.

In tandem with providing services to administrators and board members, OPERA America continued to help foster the careers of artists who bring opera to life both onstage and off. This year, the Artistic Services department instituted Career

## THE OPERA FUND 2014: REPERTOIRE DEVELOPMENT GRANTS

Since its inception more than two decades ago, *The Opera Fund* has provided nearly \$13 million in support of new works and related programming. In 2014, OPERA America awarded nine grants from *The Opera Fund* for the development of new repertoire. These grants provide financial support to OPERA America members in order to buoy the quality, quantity and creativity of new opera and music-theater works.

### JFK

Music by David T. Little  
Libretto by Royce Vavrek  
Produced by American Lyric Theater in partnership with Fort Worth Opera

### AGING MAGICIAN

Music by Paola Prestini  
Libretto by Rinde Eckert  
Produced by Beth Morrison Projects in partnership with VisionIntoArt

### PRINCE OF PLAYERS

Music by Carlisle Floyd, based on the play *Compleat Female Stage Beauty* by Jeffrey Hatcher  
Produced by Houston Grand Opera

### BEL CANTO

Music by Jimmy López  
Libretto by Nilo Cruz, based on the novel by Ann Patchett  
Produced by Lyric Opera of Chicago

### A BLIZZARD ON MARBLEHEAD NECK

Music by Jeanine Tesori  
Libretto by Tony Kushner  
Produced by the Metropolitan Opera

### CHARLIE PARKER'S YARDBIRD

Music by Daniel Schnyder  
Libretto by Bridgette A. Wimberly  
Produced by Opera Philadelphia

### SHALIMAR THE CLOWN

Music by Jack Perla  
Libretto by Rajiv Joseph, based on the novel by Salman Rushdie  
Produced by Opera Theatre of Saint Louis

### DREAM OF THE RED CHAMBER

Music by Bright Sheng  
Libretto by David Henry Hwang, based on the 18<sup>th</sup>-century Chinese novel  
Produced by San Francisco Opera

### AN AMERICA SOLDIER

Music by Huang Ruo  
Libretto by David Henry Hwang  
Produced by Washington National Opera



Blueprints for Singers, a new five-day program that provided emerging singers with seminars on a range of topics — from audition etiquette to the business of being a professional singer. The department also continued to host its popular Feedback Auditions, which allow singers to perform their audition repertoire and receive constructive feedback, as well as Recording Days, which give artists the chance to create high-quality audio recordings at an affordable rate.

Composers and librettists were offered an opportunity to experiment and present works in various stages of development at OPERA America's New Works Forum, made possible through the support of The Andrew W. Mellon Foundation. Inaugurated in 2011, the Forum allows creative teams to showcase works, participate in facilitated discussions, examine

the creative process and network with potential producers. Composer-librettist teams and the companies producing their operas are also able to showcase their compositions at the *New Works Sampler* at the annual opera conference.

Coupled with OPERA America's duty to support those in the field is its mission to engage members of the public and build interest in opera. OPERA America was able to reach varied audiences — from specialists to those new to the art form — through public events at the National Opera Center. The *Creators in Concert* evenings featured leading American composers of opera, who participated in lively discussions with audience members and presented excerpts from their recent works. In the *Conversations* series, industry luminaries joined OPERA America President/CEO Marc A. Scorca to offer their



**Top:** Composer Ricky Ian Gordon and pianist Thomas Bagwell accompanied mezzo-soprano Deanne Meek during a *Creators in Concert* evening. **Middle:** Director Christopher Alden spoke with OPERA America President/CEO Marc A. Scorca as part of the *Conversations* series. **Bottom:** Amy Burton and Joan Morris performed at a special cabaret event benefitting the Patricia Scimeca Fund for Emerging Singers.

# 2014 YEAR IN REVIEW

## OPERA AMERICA



A ceremony was held in New York for honorees of the 2014 National Opera Trustee Recognition Program. Pictured here (l-r): Michael O'Brian, Vancouver Opera; Noémi and Michael Neidorff, Opera Theatre of Saint Louis; OPERA America board member Carol F. Henry; OPERA America Chairman Frayda B. Lindemann; Kenneth G. Pigott, Lyric Opera of Chicago; Ruth W. Orth, Pensacola Opera. Not pictured: Robert L. Roschel, OperaLancaster.

behind-the-scenes perspectives on the field. Young talent was spotlighted in the *Emerging Artist Recital Series*, which presented competition winners and singers from professional training programs around the U.S. The reach of these programs was extended nationally through live-streaming via OPERA America's YouTube channel.

To engage those who may have had little or no experience with opera, OPERA America's Marketing and Communications department coordinated a 35-page advertorial entitled "The Future of Opera," which appeared in the August issue of *US Airways Magazine*. A nationally coordinated marketing campaign that highlighted local opera company brands, this collective ad buy included 26 OPERA America members, providing them with international exposure to US Airways' seven million monthly travelers.

OPERA America and its members again demonstrated the scope and variety of opera

to a broad audience through National Opera Week, held from October 24 to November 2. New for 2014, OPERA America positioned Opera Week as a communications focal point for the industry. In addition to offering public programs, participants made announcements about their positive year-round impact, creating a concentrated critical mass of opera messaging. OPERA America was privileged to have acclaimed bass-baritone Eric Owens serve as honorary chairman of the annual event.

To ensure that opera companies receive the robust philanthropic support they require, OPERA America's Government Affairs department called upon members to urge Congress to reinstate the Individual Retirement Account (IRA) charitable rollover, a provision allowing those 70½ and older to make up to \$100,000 in tax-free charitable contributions from their IRA accounts. In a major victory for nonprofits, the

## BUILDING OPERA AUDIENCES GRANTS

Since its inception in 2013, OPERA America's Building Opera Audiences grant program, funded by the Ann and Gordon Getty Foundation, has awarded \$600,000 to support innovative marketing projects. In 2014, the grant program funded seven initiatives designed to increase first-time attendance and improve audience retention rates.

### ¡VIVA LA OPERA!

Arizona Opera's statewide initiative, created in partnership with Univision, welcomes underserved communities to opera. Previously supported by a 2013 Building Opera Audiences grant, the program received a second award this year to further the goals of the project.

### BOOMER BUS

To attract individuals aged 50 to 65, Central City Opera will transport participants by bus to performances at its opera house, providing entertaining and educational experiences while on the road, such as a Q&A session with the company's education team and a presentation on Central City Opera's history.

### THE OPERA EXPRESS

Cincinnati Opera will convert a semi-trailer into a mobile opera theater to bring opera performances to unconventional locations. Short performances of 10 to 15 minutes will feature professional singers, lighting, costumes and scenery.

### RE-BRANDING OPERA

To integrate positive opera-related stories and references into film, television and advertisements, Los Angeles Opera will partner with a content marketing agency to pitch opera as valuable and viable storyline options for entertainment industry professionals.

### CAMINOS A LA ÓPERA

Lyric Opera of Chicago will offer relevant programming to Chicago's Latino communities in the opera house and neighborhood venues. This initiative will foster new community partnerships, promote involvement with schools and increase targeted marketing efforts.

### CONSUMER ENGAGEMENT RESEARCH

Consultants from outside the arts will use surveys, focus groups and experience mapping to evaluate how audiences perceive Opera Philadelphia's brand. The results will inform marketing strategies that address consumer motivations.

### OPERA @ THE WATERFRONT

Palm Beach Opera's free custom app will engage participants in a curated arts experience by providing a two-way dialogue between audiences and staff through real-time updates, such as fun facts, aria translations and surveys.

House of Representatives passed the bill to make the IRA rollover permanent. The legislature now awaits review by the Senate.

OPERA America's commitment to opera on both a local and national level is embodied by the National Opera Center, which serves local, national and international visitors alike. Since its opening in September 2012, the Opera Center has evolved beyond a rehearsal and performance venue: Visitors frequently describe it as "a home for opera." OPERA America strives to make it a place that both nurtures and showcases the art form.

Place-making like this would not be possible without the many artists and professionals who visit the Opera Center each day, shaping its character, reinventing its function and contributing to its creative energy. In the past year, an ever-growing and diverse



As part of OPERA America's new professional development program, Career Blueprints for Singers, participants had new headshots taken.

## 2015 ROBERT L.B. TOBIN DIRECTOR-DESIGNER SHOWCASE FINALISTS

OPERA America's Robert L.B. Tobin *Director-Designer Showcase* is a biennial program, now entering its fourth cycle, that brings emerging talent to the attention of the field, connecting promising directors and designers with those who are in a position to advance their careers. At the end of 2014, four finalist teams were each awarded \$2,000 to develop their proposals for opera productions. Representatives from each finalist team will attend *Opera Conference 2015* in Washington, D.C., to present their proposals to opera producers at a special live-streamed session. Over the next two years, each team will also have their designs featured in a six-month exhibition at the National Opera Center.



### ***Four Saints in Three Acts***

By Virgil Thomson and Gertrude Stein  
Director:  
Mary Birnbaum  
Set Designer:  
Grace Laubacher  
Costume Designer:  
Moria Clinton  
Lighting Designer:  
Anshuman Bhatia  
Choreographer:  
Adam Cates



### ***Lizzie Borden***

By Jack Beeson and Kenward Elmslie  
Director:  
Andreas Hager  
Set Designer:  
Kate Noll  
Costume Designer:  
Seth Bodie  
Lighting Designer:  
Solomon Weisbard



### ***Three Decembers***

By Jake Heggie and Gene Scheer  
Director:  
Joshua Miller  
Set Designer:  
William Anderson  
Costume Designer:  
Hope Bennett  
Projection Designer:  
Stephanie Busing



### ***The Cradle Will Rock***

By Marc Blitzstein  
Director:  
Alison Moritz  
Set Designer:  
Charles Murdock Lucas  
Costume Designer:  
Dina Perez  
Lighting Designer:  
Kyle Grant

## OPERA CENTER 2014 FACTS



**52,126** visitors to the Opera Center



**260** Studio Savings Cards purchased  
(Studio Savings Cards provide a 10% discount off studio rentals and were first introduced in July 2013.)



**90** rehearsals and auditions held by member organizations



**285** audio recordings created



**13** performances and discussions presented as part of OPERA America's annual season of events



**4** exhibits presented in the Opera Center's production design galleries

ICONS: THE NOUN PROJECT

constituency benefited from the Opera Center and used its facilities in increasingly varied and innovative ways: More than 52,000 people — as many as 5,000 per month — visited the Opera Center for public programs, auditions, recitals, recording sessions, workshops, performances and meetings, among other events.

Energized by the accomplishments of the past year, OPERA America looks forward to 2015 with renewed commitment to serve the field and to strengthen the role of opera across North America.

As part of its core mission to support the creation, presentation and enjoyment of opera, OPERA America will devote increasing resources to enhance opera's civic impact. The organization calls upon its members to join in this effort — to work toward a better understanding of their communities' priorities, to forge beneficial relationships within their cities and to allocate creative assets to address pressing civic needs. ●

—Nicholas Wise



AUDREY N. SACCONI

The New York Opera Alliance hosted a showcase of opera excerpts as part of the National Opera Center's second anniversary celebrations in September.

# MAKE YOUR VOICE HEARD

*Opera America* Magazine inspires and informs the opera field with a spectrum of insightful news items and feature stories.

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**To learn more, contact**  
**Ben Newman: 646.699.5237**  
**[BNNewman@operaamerica.org](mailto:BNNewman@operaamerica.org)**





## OPERA GRANTS FOR FEMALE COMPOSERS

In 2014, OPERA America inaugurated Opera Grants for Female Composers, supported by The Virginia B. Toulmin Foundation, which is a two-year project supporting individual composers as well as opera companies producing work by women. In the first year, Discovery Grants of \$12,500 were awarded to eight female composers to help fund works in progress, and in the second year, Commissioning Grants totaling \$100,000 were awarded to Professional Company Members to support commissions. The Toulmin Foundation has generously renewed the program for another two years, with the next set of Discovery Grants to be awarded in spring 2015.

### 2014 DISCOVERY GRANTS

#### ANNA CLYNE

*As Sudden Shut* weaves music, poetry, animation and choreography to create a multisensory path into the wildly explosive imagination of Emily Dickinson.

#### MICHELLE DIBUCCI

*Charlotte Salomon: Der Tod und die Malerin (Death and the Painter)*, is a ballet-opera inspired by the artwork of the acclaimed German-Jewish artist Charlotte Salomon.

#### LAURA KAMINSKY

A multimedia chamber opera, *As One* explores the revelatory, redemptive journey of a transgender individual wrestling with profound ontological issues.

#### KRISTIN KUSTER

*Old Presque Isle* explores the fable of a deactivated lighthouse, believed to be haunted, that continues to shine.

#### ANNE LEBARON

*Psyche & Delia* charts the ramifications of Albert Hofmann's discovery of LSD in 1943. Science, murders and CIA experiments provide panoramic settings for meetings of extraordinary minds.

#### FANG MAN

*Golden Lily*, inspired by the classic 16<sup>th</sup>-century Chinese novel *Jin Ping Me*, focuses on Jinlian, one of the most infamous femmes fatales in Chinese literature.

#### SHEILA SILVER

Based on the novel by Khaled Hosseini, *A Thousand Splendid Suns* examines the ways in which bonds between mothers and daughters can transcend brutality.

#### LUNA PEARL WOOLF

Based on Diana Henriques' bestselling book *The Wizard of Lies: Bernie Madoff and the Death of Trust*, *THE PILLAR* treats the Bernard Madoff scandal as a meditation on loyalty, corruption and love.

### 2015 COMMISSIONING GRANTS

#### AMERICAN OPERA PROJECTS

Wang Jie's *To Kill That Bird*, written with librettist Anne Babson, is a double bill chamber opera about strong female artists contending against the oppressive bureaucracy of zodiac animal overlords.

#### ARIZONA OPERA

Gabriela Lena Frank joins librettist Nilo Cruz to examine the complex and powerful relationship between the highly influential artists Frida Kahlo and Diego Rivera in *The Last Dream of Frida & Diego*.

#### BETH MORRISON PROJECTS

Set in a Southern gothic landscape, Ellen Reid and librettist Amanda Jane Shank's *Winter's Child* conjures a world of rough earth, quiet prayer and a mother's fight to change her youngest daughter's fate.

#### THE GLIMMERGLASS FESTIVAL

Three of Oscar Wilde's fairy tales — "The Happy Prince," "The Remarkable Rocket" and "The Selfish Giant" — are brought together by Laura Karpman and librettist Kelley Rourke into *Wilde Tales*, a three-act opera written for adults as well as children.

#### OPERA PHILADELPHIA

Missy Mazzoli and librettist Royce Vavrek's adaptation of Lars von Trier's 1996 film *Breaking the Waves* tells the story of Bess McNeill, a woman with a history of psychological problems, and her complex relationship with her husband, Jan.

#### THE INDUSTRY

Ellen Reid joins and librettist Mandy Kahn, along with five other composer-librettist teams, will collaborate on *HOPSCOTCH*, The Industry's groundbreaking opera that will tell its story in 18 different cars zigzagging throughout Los Angeles.

# PROFESSIONAL COMPANY MEMBERS

## ALABAMA

Mobile Opera

## ARIZONA

Arizona Opera

## CALIFORNIA

Festival Opera Association  
Golden Gate Opera  
The Industry  
Livermore Valley Opera  
Long Beach Opera  
Los Angeles Opera  
Opera Parallèle  
Opera San Jose  
Opera San Luis Obispo  
Opera Santa Barbara  
Paul Dresher Ensemble/Musical Traditions, Inc.  
Sacramento Region Performing Arts Alliance  
San Diego Opera  
San Francisco Opera  
Solo Opera  
Townsend Opera Players  
West Edge Opera

## COLORADO

Central City Opera  
Opera Colorado  
Opera Fort Collins

## CONNECTICUT

Salt Marsh Opera

## DELAWARE

OperaDelaware

## DISTRICT OF COLUMBIA

Washington National Opera

## FLORIDA

Florida Grand Opera  
Opera Naples  
Palm Beach Opera  
Pensacola Opera  
Sarasota Opera

## GEORGIA

The Atlanta Opera

## HAWAII

Hawaii Opera Theatre

## IDAHO

Opera Coeur d'Alene  
Opera Idaho

## ILLINOIS

Chicago Opera Theater  
DuPage Opera Theatre  
Lyric Opera of Chicago  
Sugar Creek Opera

## IOWA

Cedar Rapids Opera Theatre  
Des Moines Metro Opera

## KANSAS

Wichita Grand Opera

## KENTUCKY

Kentucky Opera

## LOUISIANA

New Orleans Opera Association  
Shreveport Opera

## MAINE

PORTopera

## MARYLAND

Annapolis Opera

## MASSACHUSETTS

Boston Baroque  
Boston Lyric Opera  
Guerilla Opera  
Juventas New Music Ensemble

## MICHIGAN

Michigan Opera Theatre

## MINNESOTA

Lyric Opera of the North  
Minnesota Opera  
Nautilus Music-Theater

## MISSISSIPPI

Mississippi Opera

## MISSOURI

Lyric Opera of Kansas City  
Opera Theatre of Saint Louis

## MONTANA

Intermountain Opera Bozeman

## NEBRASKA

Opera Omaha

## NEW HAMPSHIRE

Opera North

## NEW MEXICO

Opera Southwest  
The Santa Fe Opera

## NEW YORK

American Lyric Theater  
American Opera Projects  
Ardea Arts, Inc./  
Family Opera Initiative  
Beth Morrison Projects  
Center for Contemporary Opera  
Chautauqua Opera  
Chelsea Opera  
Delaware Valley Opera  
Encompass New Opera Theatre  
The Glimmerglass Festival  
Gotham Chamber Opera  
HERE Arts Center  
Hubbard Hall Opera Theater  
the little OPERA theatre of NY  
The Metropolitan Opera  
Music-Theatre Group  
Nickel City Opera  
Opera Ebony  
Opera on Tap  
Opera Saratoga  
Syracuse Opera  
Tri-Cities Opera  
VisionIntoArt

## NORTH CAROLINA

Asheville Lyric Opera  
North Carolina Opera  
Opera Carolina  
Piedmont Opera

## NORTH DAKOTA

Fargo-Moorhead Opera

## OHIO

Cincinnati Opera  
Dayton Opera  
Opera Circle  
Opera Columbus  
Toledo Opera

## OKLAHOMA

Tulsa Opera

## OREGON

Eugene Opera  
Portland Opera

## PENNSYLVANIA

Center City Opera Theater  
Opera Philadelphia  
Opera Theater of Pittsburgh  
OperaLancaster  
Pittsburgh Opera

## TENNESSEE

Knoxville Opera  
Nashville Opera Association  
Opera Memphis

## TEXAS

Amarillo Opera  
Austin Opera  
The Dallas Opera  
Fort Worth Opera  
Houston Grand Opera  
Opera in the Heights  
OPERA San Antonio

## UTAH

Utah Symphony | Utah Opera

## VERMONT

Green Mountain Opera Festival  
Opera Theatre of Weston

## VIRGINIA

Ash Lawn Opera Festival  
Opera on the James  
UrbanArias  
Wolf Trap Opera

## WASHINGTON

Seattle Opera  
Tacoma Opera

## WISCONSIN

Florentine Opera Company  
Madison Opera  
Opera for the Young  
Skylight Music Theatre

## CANADA

The Banff Centre  
Calgary Opera Association  
Canadian Opera Company  
Chants Libres  
Manitoba Opera  
Opera Atelier  
Opéra de Montréal  
Opéra de Québec  
Opera on the Avalon  
Pacific Opera Victoria  
Soundstreams Canada  
Tapestry New Opera Works  
Vancouver Opera

(as of December 15, 2014)

# ORGANIZATIONAL MEMBERS

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Act 1 Tours  
ADA Artist Management  
AGMA Health and Retirement Funds  
American Guild of Musical Artists  
Arts Consulting Group, Inc.  
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Barrett Vantage Artists  
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Opera In The Rock  
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The Opera Orchestra of New York  
Opera Siam/Bangkok Opera  
Foundation  
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Opera Tampa  
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Orlando Philharmonic Orchestra  
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United Scenic Artists, Local 829  
USITT  
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Vital Opera  
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Catholic University of America  
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Fashion Institute of Technology  
Florida State University  
Georgia State University  
School of Music  
In The Pocket NYC  
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The Juilliard School  
Lawrence University  
Conservatory of Music  
Louisiana State University Opera  
Manhattan School of Music  
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for Music  
Maryland Opera Studio, University of  
Maryland, College Park

*Continued on next page*

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Oberlin College, Conservatory of Music  
Rice University, The Shepherd School of Music  
Rose Bruford College  
San Francisco State University  
Shenandoah University, Conservatory of Music  
Temple University, Boyer College of Music and Dance  
Texas Christian University, School of Music  
University of Alabama  
University of Alabama at Birmingham  
University of Arizona  
University of Cincinnati, College-Conservatory of Music  
University of Colorado Boulder  
University of Florida  
University of Memphis, Rudi E. Scheidt School of Music  
University of Michigan, School of Music, Theatre and Dance  
University of Minnesota  
University of North Carolina at Greensboro  
University of the Pacific  
University of South Carolina, Opera at USC  
University of Southern Mississippi  
University of Tennessee, Knoxville  
University of Utah, Lyric Opera Ensemble  
University of Western Ontario  
University of Wisconsin-Madison  
University of Wyoming  
VOICExperience  
Westminster Choir College, Rider University  
Wichita State University Opera Theatre  
Yale School of Music, Yale Opera

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Carnegie Mellon University, Master of Arts Management Program

Cleveland Institute of Music Library  
Conservatory of Music of Puerto Rico, Library Division  
Eastman School of Music, Sibley Music Library  
Florida International University Library  
Harvard University, Eda Kuhn Loeb Music Library  
Hennepin County Library  
Indiana University Library  
International Resource Centre for Performing Artists  
Jackson State University, H.T. Sampson Library  
Johns Hopkins University, Peabody Conservatory of Music, Friedheim Music Library  
Kunitachi College of Music Library  
Los Angeles Public Library  
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New England Conservatory  
The New School Libraries  
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Oberlin College, Career Services  
Ohio University, Alden Library  
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University of North Carolina School of the Arts, Semans Library  
Washington University, Olin Library  
Westminster Choir College, Talbott Library

(as of December 15, 2014)



## ONSTAGE AT THE OPERA CENTER: 2015 SEASON

[operaamerica.org/Onstage](http://operaamerica.org/Onstage)

### CONVERSATIONS

Industry luminaries share stories from their careers and discuss the field of opera.

**Tuesday, January 27, 2015**

Sherrill Milnes, baritone

**Thursday, February 12, 2015**

Stephen Lord, conductor

**Tuesday, April 21, 2015**

David Daniels, countertenor

### CREATORS IN CONCERT

Live performances of excerpts from new American operas and lively discussions with the featured artists.

**Tuesday, March 10, 2015**

David T. Little, composer

### EMERGING ARTIST RECITAL SERIES

Companies from around the United States present recitals with competition winners and leading singers from their young artist programs.

**Saturday, April 11, 2015**

Washington National Opera  
2015 Domingo-Cafritz Young Artists

**Wednesday, May 20, 2015**

2014 Music Academy of the West  
Marilyn Horne Song Competition Winners

All *Onstage* events take place at OPERA America's National Opera Center.

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Members are also invited to private receptions with the featured artists.

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## HEARST GRANT SUPPORTS *MUSIC! WORDS! OPERA!* INITIATIVE

The Hearst Foundations have awarded a grant of \$50,000 to OPERA America, providing continued support of *Music! Words! Opera!*, the leading national program that advances K–12 student learning through opera. This grant allows OPERA America to extend the program by creating a free, fully searchable online collection of modular lesson plans and rich supplementary materials. The resource will be designed with input from a group of more than 60 teachers, opera company representatives, faculty at pre-service masters of education programs and teaching artists. The resulting digital resource will aggregate lesson plans, assessment tools and study guides, as well as provide video demonstrations of successful teaching projects.

Developed by OPERA America in the 1980s, *Music! Words! Opera!* is a series of curricula that provides classroom and music teachers a multidisciplinary approach to the arts by guiding students to create their own opera productions. The curriculum is designed to tap into students' abilities to collaborate, communicate clearly, craft stories and solve problems. Over the past 25 years, OPERA America and its members have offered hundreds of *Music! Words! Opera!* professional development workshops for teachers across North America.

The new Web component of *Music! Words! Opera!* will complement OPERA America's robust digital resources, which include in-depth courses on opera, a glossary of terms, an exploration of

voice types, and a directory of opera titles, composers and history. "With this generous grant from the Hearst Foundations, OPERA America will not only expand its digital services, but also enhance its direct support for teachers, reaching a larger community of educators than ever before," said Leah D. Wilson, director of learning and engagement at OPERA America. "This resource is the next step in connecting schools and education programs with the opera field, allowing us to leverage the art form's powerful storytelling and musical expression to build a foundation for arts education across North America." To learn more about this program, visit [operaamerica.org/MusicWordsOpera](http://operaamerica.org/MusicWordsOpera). ●

## AMERICA CELEBRATES NATIONAL OPERA WEEK

In celebration of National Opera Week 2014, which ran from October 24 to November 2, over 200 opera companies, schools and arts organizations presented more than 150 activities nationwide and online — breaking previous participation records. This year OPERA America repositioned National Opera Week as a communications focal point for the industry, encouraging participants to make announcements about their

positive year-round impact and thereby create a concentrated critical mass of opera messaging. In addition, many organizations hosted public events, performances and educational programs, displaying the vibrancy of the art form from coast to coast.

World-renowned bass-baritone Eric Owens served as honorary chairman of the annual event. "Opera is an all-encompassing art form," said Owens.

"It combines music with theater and dance and sets and lighting in a way that no other musical performance does. If you have never been to the opera before, you owe it to yourself to experience this incredibly moving and deeply affecting art form."

Visit [operaamerica.org/OperaWeek](http://operaamerica.org/OperaWeek) to watch a welcome video from Eric Owens.

*continued on page 38*



Children sang in the animal chorus of Opera Parallèle's *My Head is Full of Colors* by Chris Pratorius and Nicole Paiement.

STEVE DIBARTOLOMEO



REBECCA SNOODGRASS



MADGA KRANICE

Mezzo-soprano Joyce DiDonato sang the national anthem before Game Seven of the World Series on October 29 in Kansas City.

Eric Owens, bass-baritone and honorary chairman of National Opera Week, taped his welcome video at Lyric Opera of Chicago.

## AMERICA CELEBRATES NATIONAL OPERA WEEK

(continued)

Since its inception five years ago, National Opera Week has been coordinated by OPERA America, which calls upon its members throughout the field to participate. “Opera is thriving across the United States, as is shown by the number and scope of organizations participating in this year’s National Opera Week,” said OPERA America President/CEO Marc A. Scorca. “National Opera Week demonstrates the diversity of our art form today that promises an exciting future for opera in this country.” ●

**Top left:** Basia Revi, a teaching artist with the Metropolitan Opera Guild, worked with a class of New York City public school students through the Guild’s Urban Voices program. **Top right:** The Santa Fe Opera’s Young Voices performed at the University of New Mexico’s Center for the Arts. **Right:** OperaDelaware celebrated Opera Week with a performance of “Who’s Afraid of Opera?” and pizza from Smokey’s Brick Oven Pizza.



JESSICA BAL



KYLE GRAY



JASON HARDY

## NATIONAL OPERA WEEK 2014 A RECORD-BREAKING YEAR

205

PARTICIPATING ORGANIZATIONS

173

EVENTS

ACTIVITIES IN

37

STATES + ONLINE





**E. C. Schirmer Music Company is pleased to announce  
a new reduced orchestration of David Conte's  
“The Gift of the Magi.”**

Reduced orchestration commissioned by Hidden Valley Opera Ensemble, Carmel Valley, CA; Peter Meckel, General Director; Stewart Robertson, Music Director

**Original orchestration:** 14 players (flute, oboe, clarinet, bass clarinet, bassoon, horn, trumpet, harp, piano, string quintet)

**New Reduced orchestration:** 7 players (flute, clarinet, bassoon, violin, cello, bass, piano)

**Singers:** 4 principal roles; lyric soprano, lyric baritone; dramatic mezzo; lyric bass-baritone; 3 Magi, tenor, baritone, bass

Full score, parts, and piano/vocal scores available from:

**ECS PUBLISHING CORPORATION**

Ph. 800-647-2117 (USA only); 636-305-0100

Excerpts and sound samples:

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

e-mail: [office@ecspublishing.com](mailto:office@ecspublishing.com)

DVD recording by Trinity Lyric Opera (San Francisco)  
available at: [www.trinitylyricopera.org](http://www.trinitylyricopera.org)

Commercial recording by the San Francisco Conservatory New Music Ensemble, Nicole Paiement, conductor, available from Arsis Audio [www.arsisaudio.com](http://www.arsisaudio.com)

**REVIEWS**

“David Conte and his librettist, Nicholas Giardini, have turned (*The Gift of the Magi*) into a lovely chamber opera that should give organizations an alternative to Menotti’s *Amahl and the Night Visitors*. Conte’s music is very tonal and melodic...his word setting is really quite wonderful.”

—John Story, *Fanfare Magazine*

“The music is well orchestrated, vocally sympathetic... The level of musical dramatization is simultaneously delicate and intense, and free of cliché...”

—Joshua Rosenblum, *Opera News*

“...Music of grand romantic feelings ...(with) soaring duets and arias of Puccinian exuberance...”

—Ching Chang, *San Francisco Classical Voice*

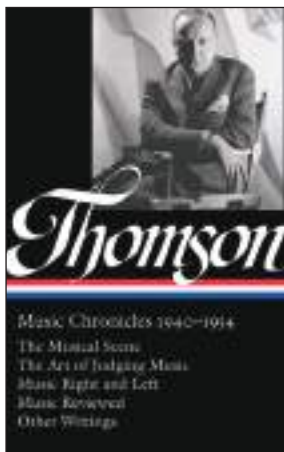
# PUBLICATIONS



## IN CHARACTER: OPERA PORTRAITURE

John F. Martin  
Amadeus Press

Over the course of six years, Martin photographed performers immediately before or after they took the stage of **SAN FRANCISCO OPERA**, capturing them fully immersed in their roles. This striking collection of photos is accompanied by texts from David Gockley, Amy Tan, Tom Sutcliffe and others from the opera world.

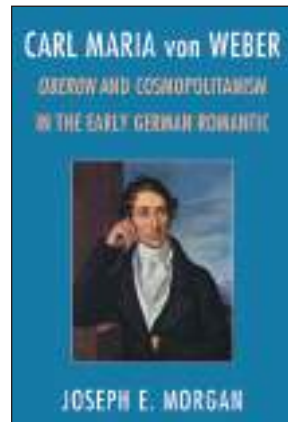


## VIRGIL THOMSON: MUSIC CHRONICLES 1940-1954

Virgil Thomson  
The Library of America

This volume brings together Thomson's writings on classical music and opera from the 14 years he served as music critic of the *New York Herald Tribune*. His witty, incisive observations chronicle such luminaries

as Stravinsky, Bernstein, Toscanini and Copland.



## OBERON AND COSMOPOLITANISM IN THE EARLY GERMAN ROMANTIC

Joseph E. Morgan  
Rowman & Littlefield

The author examines Carl Maria von Weber's long-misunderstood work *Oberon*, explaining its thematic and harmonic organization, stylistic idiosyncrasies, and relationship to the Romantic and nationalist movements in Germany.

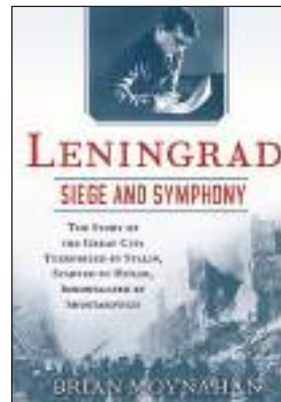


## GRAND OPERA: THE STORY OF THE MET

Charles Affron  
and Mirella Jona Affron  
University of California Press

The first new history of **THE METROPOLITAN OPERA** to appear in 30 years, this volume presents chronologically sequenced chapters that each survey a composer or slice of the

repertoire, bringing to life the dominant personalities and memorable performances of every era.



## LENINGRAD: SIEGE AND SYMPHONY

Brian Moynahan  
Atlantic Monthly Press

The brutal Nazi siege of Leningrad is interpreted through the lens of Shostakovich's Seventh Symphony. Weaving military, political and cultural history, the author explores the context of Stalinist oppression in which the composer's ode to the city was born.



## THE MODERN CASTRATO

Patricia Howard  
Oxford University Press

This biography of Gaetano Guadagni, the most significant castrato of the second half of the 18<sup>th</sup> century, details the singer's role in the reform of heroic

opera and examines his relationships with many forward-thinking composers of the age.



## AFTER WAGNER: MODERNIST MUSIC DRAMA FROM PARSIFAL TO NONO

Mark Berry  
Boydell Press

The author examines Wagner's successors — from Strauss and Schoenberg to Nono and Henze — exploring the intersection of 20<sup>th</sup>-century music drama with politics and cultural history. A section of the book is also devoted to modern approaches to directing opera, as initiated by Wagner himself.

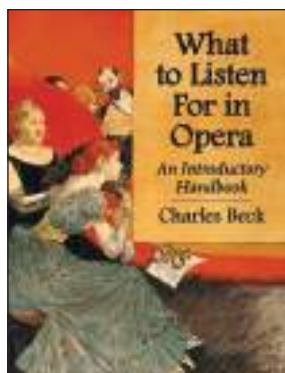


## THE TRIUMPH OF PLEASURE: LOUIS XIV & THE POLITICS OF SPECTACLE

Georgia J. Cowart  
University of Chicago Press

This landmark study of French opera, ballet and theater in the 17<sup>th</sup> and early 18<sup>th</sup> centuries

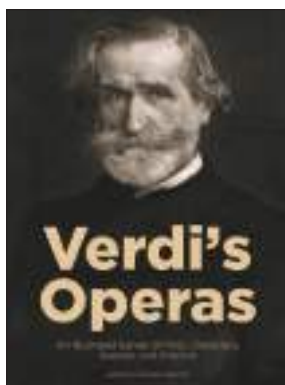
is now available in paperback after being out of print. The author surveys spectacle as it emerged from the court and moved into the Parisian public sphere, particularly examining imagery of propaganda and political protest.



**WHAT TO LISTEN FOR IN OPERA: AN INTRODUCTORY HANDBOOK**

**Charles Beck**  
McFarland

This handbook serves as an introduction to opera for those new to the art form as well as a guide to greater understanding for established fans. The volume covers well-known operas from 14 Italian, French and German composers, helping listeners understand the artistry involved in bringing the works to life.

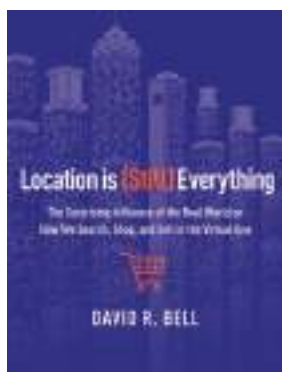


**VERDI'S OPERAS**

**Giorgio Bagnoli, ed.**  
Amadeus Press

This illustrated guide to 26 of Verdi's operas, aimed at

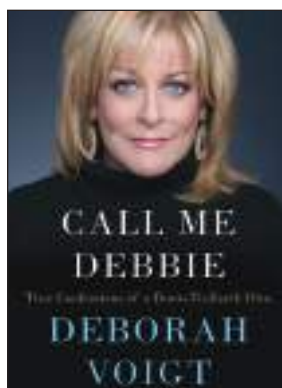
both specialists and casual operagoers, provides act-by-act synopses of each work, historical context and analysis of subject matter. The literary sources that inspired Verdi's creativity and the librettists who worked with him are also detailed.



**LOCATION IS (STILL) EVERYTHING**

**David R. Bell**  
New Harvest

Of particular interest to marketers of opera, this study of online commerce looks at the motivations and patterns of consumer behavior. The author, a professor at the Wharton School, argues that the way people use the Internet — including their buying habits — is still largely shaped by the physical world.

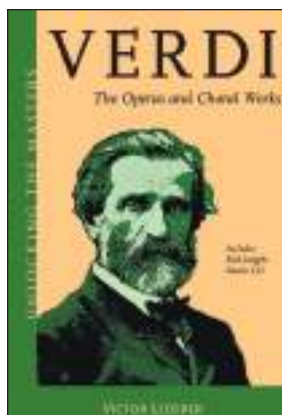


**CALL ME DEBBIE**

**Deborah Voigt**  
HarperCollins

Subtitled "True Confessions of a Down-To-Earth Diva," Voigt's memoir details her harrowing and ultimately

successful battles to overcome addictions and self-destructive tendencies. The much-admired singer also sheds light on the roles she has portrayed in addition to the artists with whom she has worked.



**VERDI: THE OPERAS AND CHORAL WORKS**

**Victor Lederer**  
Amadeus Press

In addition to outlining Verdi's 28 operas, as well as the Requiem and *Quattro pezzi sacri*, this guide provides extended analysis of each of Verdi's later masterpieces — *Don Carlo*, *Aida*, *Otello* and *Falstaff*. A Naxos CD of musical highlights accompanies the book.

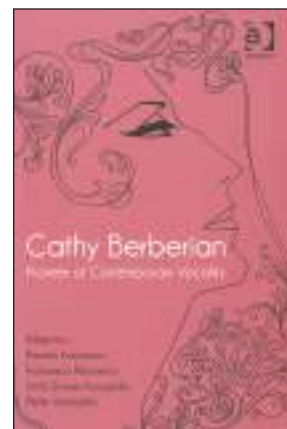


**GONDOLA**

**Donna Leon**  
Atlantic Monthly Press

Crime novelist Donna Leon examines the history and culture of gondolas, giving particular attention to the barcaroles sung by gondoliers.

This lavishly illustrated volume is accompanied by a CD of popular Venetian barcaroles, including an exclusive track by Cecilia Bartoli.



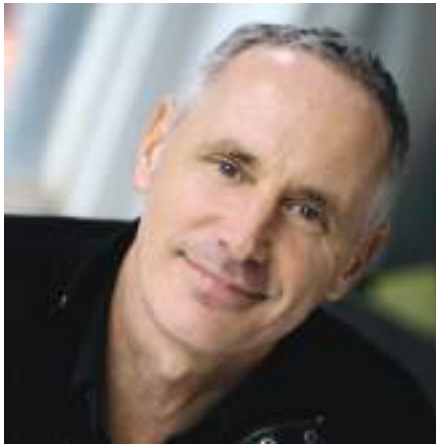
**CATHY BERBERIAN: PIONEER OF CONTEMPORARY VOCALITY**

**Pamela Karantonis, Francesca Placanica, Anne Siivuoja-Kauppa and Pieter Verstraete, eds.**  
Ashgate

This volume examines the career of pioneering vocal artist and composer Cathy Berberian, who redefined the limits of composition and challenged theories of authorship. Primary source documents, some published in English for the first time, illuminate Berberian's engagement with voice philosophy, new music, vocal experimentation and technology. ●

# MY FIRST OPERA

BY MARK CAMPBELL



LAURA MARIE DUNCAN

I really don't recall where or when I saw my first opera, but it certainly wasn't during my childhood in a small Maryland town. Yes, there was Bugs Bunny on television belting Wagner in Brooklynesque and my little fingers strutting through "The March of the Toreadors" in *John Thompson's Modern Course for the Piano*, but in our household certain art forms were viewed with suspicion — and opera was the most suspect. Piano lessons were okay. (Musical lessons were part of every child's education.) Listening to certain Broadway cast albums was okay. (They were American.) But opera? It was elitist. And pretentious. And boring. And long. And in a foreign language. Most damning, it was European. The foundation of these opinions about opera, of course, was based on never actually having seen one.

It's also likely that my parents believed that opera might not be the best influence on their overwrought son, who had already displayed an inconvenient theatricality while touring the basements of neighbors' homes with his own play, *The Gray-Green Ghost*. They were no doubt alarmed by the strange specificity of the color in the title, as well my desire to play all roles, regardless of gender. Just imagine the damage opera might do.

While I cannot recall the first opera I saw, I do remember my opera stage debut: I was a dancer in a college production of *The Marriage of Figaro* at University of Colorado, where I was studying theater and dance. Backstage, in tights, a frilly blouse and a headache-inducing wig, I marveled at the familiar music while giggling inwardly at the preposterous acting. It all seemed so ridiculous. And pretentious. And

boring. And long. I began to feel that my prejudice about opera might be an inherited trait, and a healthy one at that.

Such a fate came to an end in 1980 when I saw *Sweeney Todd* on Broadway. The tale of the demon barber, as told by Stephen Sondheim and Hugh Wheeler (and yes, I always credit the book writer/librettist as co-author — as should we all), jolted me into a new perspective on musical storytelling. The work was performed in a Broadway theater and was called a musical, but its structure, its story and the complexity of its music were, in my mind, decidedly operatic.

Over time I would trade a highly unsuccessful career as an actor for a moderately successful career as a musical theater lyricist, finally arriving at a happy career as an opera librettist, while supporting myself along the way with a day job in advertising (which I was able to give up only last year). Meanwhile, I studied Sondheim's scores devoutly and later become enchanted by works as diverse as *The Ghosts of Versailles* by John Corigliano and William M. Hoffman and *Dead Man Walking* by Jake Heggie and Terrence McNally. Whenever possible, I studied by watching, not by reading. (Reading librettos can be tiresome — if they are any good they should be sung, not spoken.) I studied playwrights, poets and lyricists. All very different source materials, but all sharing a certain quality of storytelling that appealed to me.

By the time the wonderful composer and musician John Musto asked me to collaborate on an opera in 2001, I was ready. *Volpone* was produced by **WOLF TRAP OPERA**, and its success with audiences made me feel that in

this dangerous musical form called opera I had finally found an artistic home. I will always be grateful to John for giving me that chance. *Volpone* was truly "my first opera."

When I began my career as a librettist, there were few, if any, workshop or developmental programs such as there are today. So, just as John Musto gave me the chance on my first opera, I now mentor aspiring librettists for **AMERICAN LYRIC THEATER**, **WASHINGTON NATIONAL OPERA**'s American Opera Initiative, **OPERA PHILADELPHIA**'s Composer in Residence program and **AMERICAN OPERA PROJECTS**. I encourage young writers not to be afraid to draw from popular source materials. Composers and librettists have *always* borrowed from hit plays and books: Verdi mined Shakespeare, Puccini optioned novels and plays. I teach what I endeavor to write: operas that wear their storytelling proudly — not elitist, not pretentious, not boring and not long. And very American. ●

*Mark Campbell wrote the libretto for Silent Night, premiered by MINNESOTA OPERA, which garnered the 2012 Pulitzer Prize in Music for Kevin Puts. He is currently working on librettos for The Shining with Paul Moravec, The Manchurian Candidate with Kevin Puts, Dinner at Eight with William Bolcom, and Memory Boy with Reinaldo Moya (all for Minnesota Opera). Additional works in process include Burke + Hare with Julian Grant (for MUSIC-THEATRE GROUP), Elizabeth Cree with Kevin Puts (for Opera Philadelphia) and The Whole Truth with Robert Paterson (for URBANARIAS).*



PHILIP GROSHONG/CINCINNATI OPERA

Soldiers prepare to go to war in Cincinnati Opera's production of *Silent Night* by Kevin Puts and Mark Campbell. Front row (l-r): Hugh Russell (Father Palmer), Thomas Blondelle (Nikolaus Sprink), Tyler Alessi (William Dale), Phillip Addis (Lt. Audebert) and Thomas Glenn (Jonathan Dale).

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*The Boston Globe*

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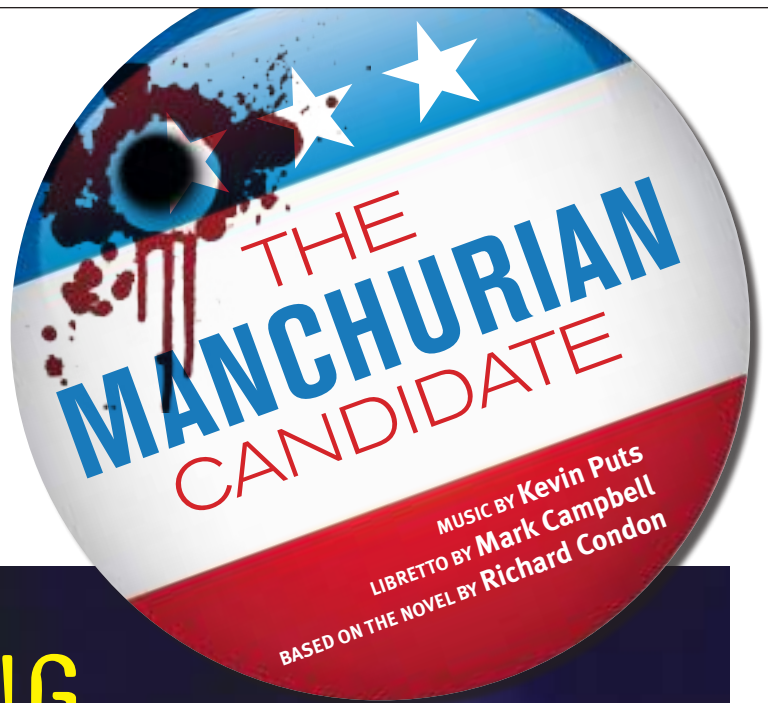
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# THE SHINING

MUSIC BY Paul Moravec  
LIBRETTO BY Mark Campbell  
BASED ON THE NOVEL BY Stephen King  
World Premiere Spring 2016

# Dinner at Eight

MUSIC BY William Bolcom  
LIBRETTO BY Mark Campbell  
BASED ON THE PLAY BY  
George S. Kaufman  
and Edna Ferber  
World Premiere 2016-2017 Season



[mnopera.org](http://mnopera.org)

**OPERA  
AMERICA  
FINANCIAL  
REPORT  
FY2014**

# LETTER FROM THE CHAIRMAN

---



The landscape of opera is measured in seasons, productions, performances, audiences and, of course, in dollars. Those of us committed to sustaining the artistic excellence of professional opera companies understand that traditional and innovative performances — and the wonderful sound of applause that follows — require sustained sources of earned and contributed income.

I am pleased to report that the most current data on the North American opera field, as presented in the following pages, demonstrates improving health, particularly in relation to the dramatic downturn we all experienced as a result of the 2008 global recession. We are not so naive as to pine for so-called “golden days” (in truth, resources for opera have always been mercurial), but our outlook on the future of audiences and balance sheets is not as troubling as it was five years ago. Our productions may not be as numerous, nor our audiences as large, but opera remains a vital art form with ardent devotees on both sides of the proscenium.

Sustaining this renewed confidence requires every OPERA America member company to innovate. Our national service organization cannot do it alone. We look to our members for new ideas, not just in repertoire and venue choices, but in marketing, fundraising, board leadership and, most of all, ensuring that your company is seamlessly woven into the fabric of your community. Regardless of whether income goes up or down in any given year, we must be steadfast in our investment in civic life. OPERA America is poised to lead, but we lead best by your example.

Once again, OPERA America itself continues a tradition of financial health, with a balanced budget and strong cash position. We are elated that the National Opera Center continues to meet its revenue goals while achieving its strategic objective to be a national home for opera. For those of you who have not availed yourselves of this wonderful facility, I encourage you to do so. You will hear vibrant voices throughout the hallways and see an impressive array of resources for research, recording and meetings.

This creative energy extends beyond the walls of the National Opera Center. OPERA America continues to expand its programs and services, albeit at a responsible pace so as to maintain our financial integrity. Our grants to grow audiences, foster new works, and nurture directors and designers remain hallmarks of our support to the field. This year, we are particularly proud of launching a new program — Opera Grants for Female Composers — with the generous support of The Virginia B. Toulmin Foundation. We look forward to hearing more voices from the other half of the composer community.


Though I do not wish to trump the celebrations, to be held on February 28, I just cannot wait until next year’s annual report without acknowledging the 25<sup>th</sup> anniversary of President/CEO Marc A. Scorca as our leader. As chairman of OPERA America and an officer of the Metropolitan Opera, I applaud his contributions to the field. His capacity for understanding the passion of opera audiences and the complex dynamics of opera companies has strengthened us individually and collectively, even as his devotion to creative artists has spawned a new generation of repertoire.

Most of all, Marc’s warm friendship is a constant source of joy. Would that I could lead a standing ovation on the printed page, so suffice it to say: Bravissimo!

Frayda B. Lindemann, Ph.D.  
Chairman, OPERA America Board of Directors  
Vice President, The Metropolitan Opera Board of Directors



# OPERA AMERICA FINANCIAL REPORT

 PERA America ended fiscal year 2014 with a balanced budget and a modest operating surplus of \$7,538. The total increase in net assets over the course of the fiscal year was \$12,708, bringing total net assets to just over \$14 million. OPERA America moved \$2.3 million into permanently restricted endowments to reach just below \$8 million in *The Opera Fund* and Opera Center endowments combined. At the end of FY2014, OPERA America retained \$278,113 in unrestricted operating and facilities maintenance reserves.

## AUDITED STATEMENT OF FINANCIAL POSITION

AS OF JUNE 30, 2014

Total Assets	\$18,509,400
Total Liabilities	\$4,371,239
<b>Total Net Assets</b>	<b>\$14,138,161</b>
Core Operating Reserve	\$241,586
Facilities Reserve	\$36,527
Restricted Program Funds	\$3,298,349
National Opera Center	\$5,116,784
Permanently Restricted Funds	\$7,944,915

## AUDITED STATEMENT OF ACTIVITIES (INCLUDING OPERA CENTER CAPITAL CAMPAIGN)

AS OF JUNE 30, 2014

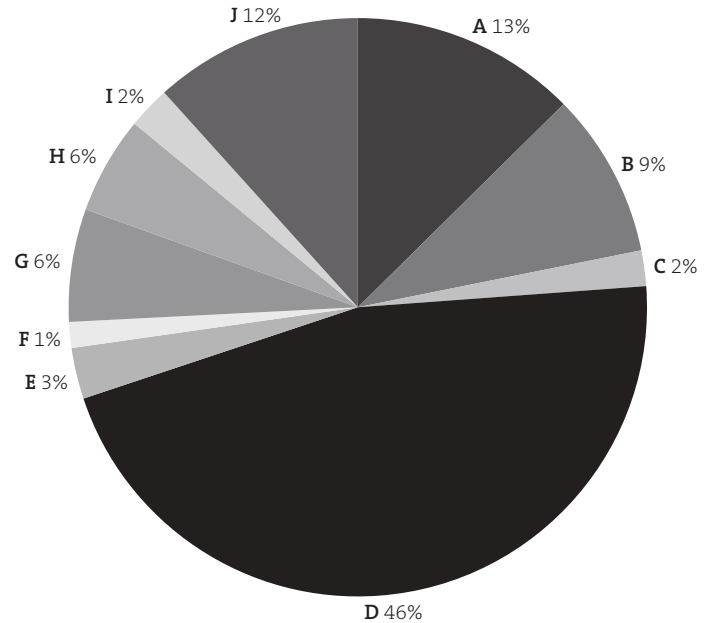
		Percent of Total
Total Earned	\$2,725,239	51%
Total Contributed	\$2,660,237	49%
<b>Total Revenue</b>	<b>\$5,385,476</b>	
Program Services	\$4,206,356	78%
General and Administrative	\$740,823	14%
Development	\$425,589	8%
<b>Total Expenses</b>	<b>\$5,372,768</b>	
<b>Change In Net Assets</b>	<b>\$12,708</b>	

# OPERA AMERICA FINANCIAL REPORT

## OPERA AMERICA FISCAL YEAR 2014 OPERATING REVENUE

(INCLUDING OPERA CENTER OPERATIONS)

A	Membership Fees and Dues	\$680,267
B	Annual Fund Support	\$498,618
C	Corporate Contributions	\$107,500
D	Foundation Grants	\$2,485,433
E	Government Grants	\$154,260
F	In-Kind Support	\$78,100
G	Endowment Draw	\$340,000
H	Conference Revenue	\$294,598
I	Other Earned Income	\$128,029
J	Opera Center Rentals	\$630,267
<b>Subtotal</b>		<b>\$5,397,072</b>



## OPERA AMERICA FISCAL YEAR 2014 OPERATING EXPENSES

(INCLUDING OPERA CENTER OPERATIONS)

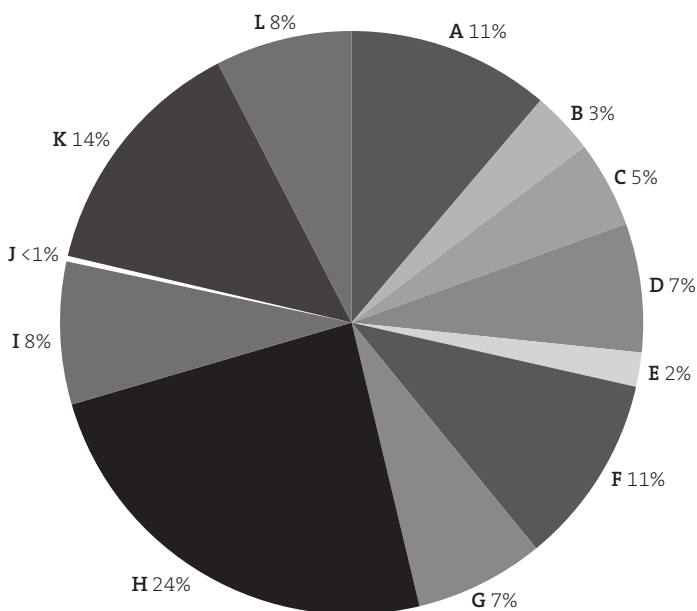
### Program Services

A	Artistic	\$604,330
B	Membership	\$188,024
C	Media Relations	\$258,560
D	Information Services and Publications	\$384,786
E	Education	\$102,278
F	Audience Development	\$568,823
G	Annual Conference	\$386,371
H	Opera Center	\$1,304,923

### Support Services

I	Development	\$425,589
J	Facilities Reserve Deposit	\$16,736
K	General and Administrative	\$740,823
L	Occupancy Costs	\$408,291

<b>Subtotal</b>		<b>\$5,389,534</b>
<b>OPERATING SURPLUS</b>		<b>\$7,538</b>



**OPERA  
AMERICA  
ANNUAL  
FIELD  
REPORT**

# OPERA AMERICA ANNUAL FIELD REPORT

## 50 MILLION

PEOPLE EXPERIENCED OPERA ON STAGE, VIA RADIO AND TV, IN CINEMAS, AND AT STADIUMS, PARKS AND ALTERNATIVE VENUES.

**O**PERA America's Annual Field Report is designed to provide leaders in the field with a comprehensive overview of the financial position of its members. Information for this report, based on the 2013 fiscal year, is derived from the annual Cultural Data Project/Professional Opera Survey (CDP/POS) completed this year by 64 OPERA America members (the "Survey Universe"). Only those companies in the Survey Universe that have reported consistently for the most recent five-year period are included in the Constant Sample Group (CSG) for each budget level. This year a total of 57 companies qualified for the CSGs in their respective budget levels. Because the size of the Metropolitan Opera's budget and the scope of its activities would skew the averages upon which much of Annual Field Report is based, its data is not included.

The 57 companies in the CSGs represent 55% of OPERA America's total Professional Company Membership and a \$530 million portion of their collective operating budgets. If the Metropolitan Opera and the entire Professional Company Membership of OPERA America were to be included, it is estimated that the North American opera industry injects nearly \$1 billion directly into the economy each year. This figure does not include the extensive activity of OPERA America's Associate and Educational Producing Associate Members.

## A GUIDE TO TERMINOLOGY

### TOTAL NET ASSETS

Includes Unrestricted Net Assets (no donor-imposed restrictions) that are available for current use, generally including fixed assets; Temporarily Restricted Assets (representing gifts for future periods or for specific projects); and Permanently Restricted Net Assets, which are most commonly endowment funds. Changes in the value of Permanently Restricted Net Assets reflect increases/decreases in the marketing value of existing investments and/or new donations.

### WORKING CAPITAL

Unrestricted resources, including cash, available for ongoing operations. Calculated as unrestricted net assets minus fixed assets.

### INVESTMENTS

Long-term investments, including those reported on an organization's balance sheet and separately incorporated endowment funds. Investments may be unrestricted, temporarily restricted or permanently restricted. Income from investments is available for operations or to support specific purposes.

### FIXED ASSETS

Includes all land, buildings, equipment, any capitalized production elements (sets, props, costumes) and other fixed assets owned by the organization. Fixed assets are generally unrestricted but may be temporarily restricted. Net fixed assets are net of accumulated depreciation.

### PRODUCTIVITY RATIOS

Measure how many dollars are generated for each dollar spent on revenue generating activities. Expenses include personnel and non-personnel costs.

#### MARKETING PRODUCTIVITY:

Total box office revenue divided by marketing and box office expenses.

#### DEVELOPMENT PRODUCTIVITY:

Total contributions (including restricted, temporarily and permanently restricted) divided by development expenses.

### PROGRAM COVERAGE

The percentage of core artistic expenses covered by box office revenue.

### ANNUALIZED GROWTH

Annualized growth rates are based on a 1.86% CPI from 2009–2013.

# LEVEL 1 OVERVIEW

ANNUAL BUDGET OVER \$10,000,000

# 11 COMPANIES

Constant Sample Group for this survey based on data reported from:

The Dallas Opera  
 Florida Grand Opera  
 Houston Grand Opera  
 Los Angeles Opera  
 Lyric Opera of Chicago  
 Minnesota Opera  
 San Diego Opera  
 San Francisco Opera  
 The Santa Fe Opera  
 Seattle Opera  
 Utah Symphony | Utah Opera

**F**or the first time since the 2008 recession, 10 of the 11 companies in the Constant Sample Group posted surpluses in 2013, versus 8 that posted losses in 2012. Of the 11 companies, 7 achieved surpluses of over \$1 million, with an average surplus of \$1.126 million. Paid attendance and capacity utilization rose to the highest levels since 2009, while box office revenue dropped less than 2%. The push to sell more tickets at lower prices decreased marketing productivity by nearly 4% between 2012 and 2013, resulting in ticket revenues covering just half the cost of programming — a reverse of the gains achieved in 2011 and 2012.

Contributed revenue was only 5.4% below 2009 levels, attributable to generous individual (non-board) giving over the past 5 years. Board giving in 2013 increased an average of 9.5% over 2012. Significant increases in other earned income in 2013 came primarily from beneficial non-investment financial activity and rentals of production inventory.

Between 2009 and 2013, total expenses were reduced by 3.8%, chiefly through non-personnel expense reductions. Some expenses returned to near-2009 levels, notably those related to artistic and production personnel and general administrative non-personnel expenses.

Purpose-released restricted assets and a rebound in investment gains following the losses of 2009 pushed overall unrestricted revenue up 37%. Assets released from restriction provided nearly a quarter of operating revenue in 2013. Ongoing increases in investment assets improved balance sheet performance, indicating a stable resetting of business operations in the new economy. Net assets leveled off at over 200% of operating expenses.

## OPERATING NET INCOME

AVERAGE OF U.S. CONSTANT SAMPLE GROUP OF (11) LEVEL 1 COMPANIES

						Pctg. Change		4-yr Annualized Growth Rate
	2009	2010	2011	2012	2013	1-yr	4-yr	
Total Operating Revenue	\$22,039,616	\$32,343,785	\$29,342,705	\$25,876,519	\$30,370,680	17.4%	37.8%	8.3%
Total Expense	\$39,388,775	\$28,425,198	\$28,053,615	\$28,262,020	\$29,244,931	3.5%	-3.8%	-1.0%
<b>Operating Net Income</b>	<b>(\$8,349,160)</b>	<b>\$3,918,587</b>	<b>\$1,289,091</b>	<b>(\$2,385,501)</b>	<b>\$1,125,749</b>			
as % of Expense	-27.7%	13.8%	4.6%	-8.4%	3.8%			

## BALANCE SHEET

AVERAGE OF U.S. CONSTANT SAMPLE GROUP OF (11) LEVEL 1 COMPANIES

						Pctg. Change		4-yr Annualized Growth Rate
	2009	2010	2011	2012	2013	1-yr	4-yr	
<b>NET ASSETS</b>								
Unrestricted	\$7,466,584	\$11,272,986	\$12,643,236	\$10,267,185	\$12,367,644	20.5%	65.6%	13.4%
Temporarily Restricted	\$13,671,354	\$15,139,563	\$16,934,569	\$16,102,449	\$19,136,762	18.8%	40.0%	8.8%
Permanently Restricted	\$28,800,983	\$30,068,125	\$28,993,982	\$32,972,679	\$34,617,232	5.0%	20.2%	4.7%
<b>Total Net Assets</b>	<b>\$49,938,921</b>	<b>\$56,480,675</b>	<b>\$58,571,788</b>	<b>\$59,342,313</b>	<b>\$66,121,638</b>	<b>11.4%</b>	<b>32.4%</b>	<b>7.3%</b>
as % of Expense	164.3%	198.7%	208.8%	210.0%	226.1%			
<b>Working Capital</b>	<b>(\$4,838,683)</b>	<b>(\$1,138,104)</b>	<b>\$481,905</b>	<b>(\$1,306,276)</b>	<b>\$1,216,792</b>			
as % of Expense	-15.9%	-4.0%	1.7%	-4.6%	4.2%			
<b>Investments *</b>	<b>\$36,878,119</b>	<b>\$44,621,531</b>	<b>\$45,519,876</b>	<b>\$49,006,658</b>	<b>\$51,700,320</b>	<b>5.5%</b>	<b>40.2%</b>	<b>8.8%</b>
as % of Expense	121.4%	157.0%	162.3%	173.4%	176.8%			
<b>Net Fixed Assets</b>	<b>\$12,305,268</b>	<b>\$12,411,090</b>	<b>\$12,161,331</b>	<b>\$11,573,460</b>	<b>\$11,150,853</b>	<b>-3.7%</b>	<b>-9.4%</b>	<b>-2.4%</b>

\* Including Separately Incorporated Endowments

# LEVEL 1 PERFORMANCE ACTIVITY

# 1,609,436

**2013 TOTAL ATTENDANCE\***  
FOR CONSTANT SAMPLE GROUP

## PERFORMANCE ACTIVITY

AVERAGE OF U.S. CONSTANT SAMPLE GROUP OF (11) LEVEL 1 COMPANIES

	2009	2010	2011	2012	2013
<b>PERFORMANCE ACTIVITY</b>					
Main Season Productions	6.2	5.8	5.6	5.5	5.5
Main Season Performances	42.4	38.1	37.4	36.8	38.4
<b>ATTENDANCE</b>					
Main Season Paid Attendance	103,407	86,838	84,255	83,939	91,752
Total Seats Available	121,178	104,290	101,716	101,132	104,910
% of Capacity Sold	85.3%	83.3%	82.8%	83.0%	87.5%
Subscription Renewal Rate	74.7%	81.8%	75.2%	76.5%	74.2%
<b>PRICING</b>					
High Full Subscription Price	\$1,455	\$1,423	\$1,391	\$1,391	\$1,359
Low Full Subscription Price	\$103	\$104	\$91	\$108	\$104
High Single Ticket Price	\$212	\$266	\$259	\$266	\$274
Low Single Ticket Price	\$14	\$14	\$16	\$15	\$16
High Orchestra Ticket Price	\$194	\$280	\$298	\$310	\$253
Low Orchestra Ticket Price	\$80	\$95	\$71	\$95	\$64

\* Does not include virtual attendance through radio, TV, live streams or cinemas.



LYNN LANE

# LEVEL 1 REVENUE

# \$334,077,476

## 2013 TOTAL OPERATING REVENUE

FOR CONSTANT SAMPLE GROUP

### OPERATING REVENUE

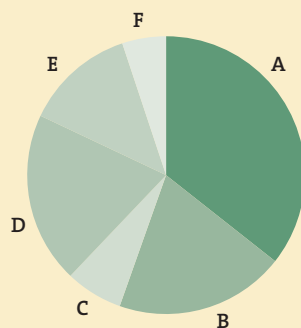
AVERAGE OF U.S. CONSTANT SAMPLE GROUP OF (11) LEVEL 1 COMPANIES

	2009	2012	2013	Pctg. Change		4-yr Annualized Growth Rate
				1-yr	4-yr	
<b>UNRESTRICTED EARNED REVENUE</b>						
Box Office	\$10,586,064	\$9,496,401	\$9,367,820	-1.4%	-11.5%	-3.0%
Investment	(\$4,762,098)	(\$363,685)	\$1,706,486			
Other Earned	(\$1,053,979)	\$490,213	\$2,168,608			
<b>Total Unrestricted Earned Revenue</b>	<b>\$4,769,988</b>	<b>\$9,622,928</b>	<b>\$13,242,914</b>	<b>37.6%</b>	<b>177.6%</b>	<b>29.1%</b>
<b>UNRESTRICTED CONTRIBUTED REVENUE</b>						
<b>Private Support</b>						
Individual	\$2,977,365	\$3,627,793	\$3,680,365	1.4%	23.6%	5.4%
Board	\$2,703,916	\$1,865,774	\$2,043,739	9.5%	-24.4%	-6.8%
Corporate	\$723,127	\$607,130	\$690,457	13.7%	-4.5%	-1.1%
Foundation	\$2,371,729	\$1,942,509	\$2,057,883	5.9%	-13.2%	-3.5%
Other Private Support	\$1,454,975	\$1,725,401	\$1,328,525	-23.0%	-8.7%	-2.2%
<b>Total Unrestricted Private Support</b>	<b>\$10,231,112</b>	<b>\$9,768,608</b>	<b>\$9,800,970</b>	<b>0.3%</b>	<b>-4.2%</b>	<b>-1.1%</b>
<b>Total Unrestricted Government Support</b>	<b>\$686,767</b>	<b>\$477,947</b>	<b>\$528,024</b>	<b>10.5%</b>	<b>-23.1%</b>	<b>-6.4%</b>
<b>Total Unrestricted Contributed Revenue</b>	<b>\$10,917,879</b>	<b>\$10,246,555</b>	<b>\$10,328,994</b>	<b>0.8%</b>	<b>-5.4%</b>	<b>-1.4%</b>
<b>Net Assets Released From</b>						
<b>Restriction and Transfers/Reclassifications</b>	<b>\$6,351,749</b>	<b>\$6,007,036</b>	<b>\$6,798,772</b>	<b>13.2%</b>	<b>7.0%</b>	<b>1.7%</b>
<b>Total Operating Revenue</b>	<b>\$22,039,616</b>	<b>\$25,876,519</b>	<b>\$30,370,680</b>	<b>17.4%</b>	<b>37.8%</b>	<b>8.3%</b>

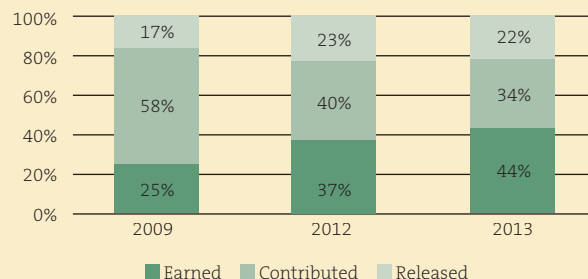
Note: Level 1 Constant Sample Group companies reported \$4.5 million in one-time UPMIFA transfers and reclassification in FY2011.

### 2013 CONTRIBUTED REVENUE SOURCES

<b>A</b> Individual	\$3,680,365
<b>B</b> Board	\$2,043,739
<b>C</b> Corporate	\$690,457
<b>D</b> Foundation	\$2,057,883
<b>E</b> Other Private Support	\$1,328,525
<b>F</b> Government	\$528,024
<b>TOTAL</b>	<b>\$10,328,994</b>



### PERCENT OF TOTAL OPERATING REVENUE



Note: In 2009, Lyric Opera of Chicago and San Francisco Opera posted major shortfalls in earned revenue through unrealized investment losses.

LEFT: Houston Grand Opera's *Das Rheingold* with (l-r) Catherine Martin (Wellgunde), Andrea Carroll (Woglinde), Christopher Purves (Alberich) and Renée Tatum (Flosshilde). Conducted by Patrick Summers and directed by Carlus Padrissa of La Fura Dels Baus. Scenic design by Roland Olbeter, costume design by Chu Uroz, lighting design by Peter van Praet and video design by Franc Aleu.

# LEVEL 1 EXPENSES

# \$321,694,238

## 2013 TOTAL EXPENSE

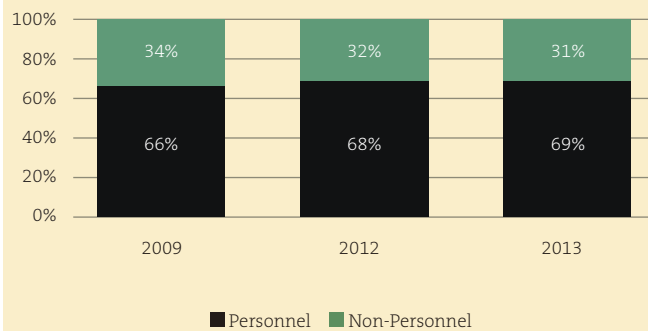
FOR CONSTANT SAMPLE GROUP

### EXPENSES

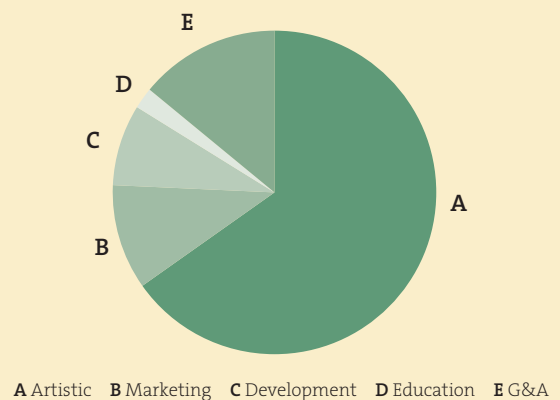
AVERAGE OF U.S. CONSTANT SAMPLE GROUP OF (11) LEVEL 1 COMPANIES

	2009	2012	2013	Pctg. Change		4-yr Annualized Growth Rate
				1-yr	4-yr	
<b>PERSONNEL</b>						
Artistic	\$10,157,498	\$9,336,456	\$9,706,211	4.0%	-4.4%	-1.1%
Production and Technical	\$5,408,268	\$5,097,002	\$5,345,622	4.9%	-1.2%	-0.3%
Singer Training	\$295,101	\$270,041	\$210,401	-22.1%	-28.7%	-8.1%
Marketing/PR/Box Office	\$1,081,847	\$1,123,542	\$1,164,404	3.6%	7.6%	1.9%
Development	\$1,243,498	\$1,246,635	\$1,357,268	8.9%	9.1%	2.2%
Education	\$322,217	\$379,042	\$417,418	10.1%	29.5%	6.7%
General and Administrative	\$1,646,065	\$1,812,460	\$1,932,301	6.6%	17.4%	4.1%
<b>Total Personnel Expense</b>	<b>\$20,154,494</b>	<b>\$19,265,179</b>	<b>\$20,133,624</b>	<b>4.5%</b>	<b>-0.1%</b>	<b>0.0%</b>
<b>NON-PERSONNEL</b>						
Production	\$3,958,492	\$3,239,706	\$3,240,415	0.0%	-18.1%	-4.9%
Singer Training	\$120,938	\$211,152	\$213,080	0.9%	76.2%	15.2%
Broadcasting, Recording and Internet Expense	\$354,589	\$148,608	\$146,801	-1.2%	-58.6%	-19.8%
Marketing/PR/Box Office	\$2,115,597	\$1,848,236	\$1,877,111	1.6%	-11.3%	-2.9%
Development	\$1,072,588	\$1,089,942	\$991,018	-9.1%	-7.6%	-2.0%
Education	\$97,640	\$185,380	\$197,398	6.5%	102.2%	19.2%
General and Administrative	\$2,061,983	\$1,996,706	\$2,128,678	6.6%	3.2%	0.8%
Other Earned Income Expenses	\$452,453	\$277,112	\$316,808	14.3%	-30.0%	-8.5%
<b>Total Non-Personnel Expense</b>	<b>\$10,234,281</b>	<b>\$8,996,841</b>	<b>\$9,111,307</b>	<b>1.3%</b>	<b>-11.0%</b>	<b>-2.9%</b>
<b>Total Expense</b>	<b>\$30,388,775</b>	<b>\$28,262,020</b>	<b>\$29,244,931</b>	<b>3.5%</b>	<b>-3.8%</b>	<b>-1.0%</b>

### PERCENT OF TOTAL EXPENSES



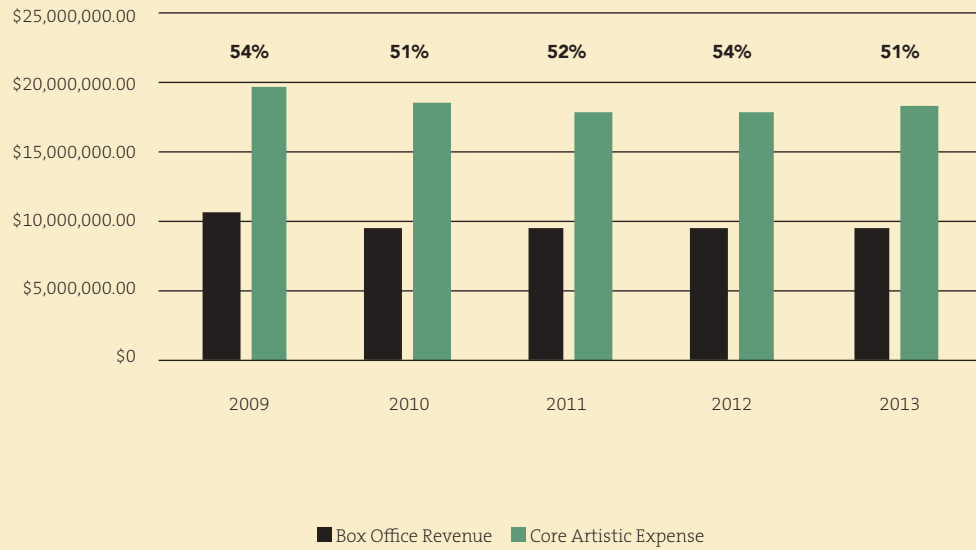
### 2013 EXPENSE BREAKDOWN



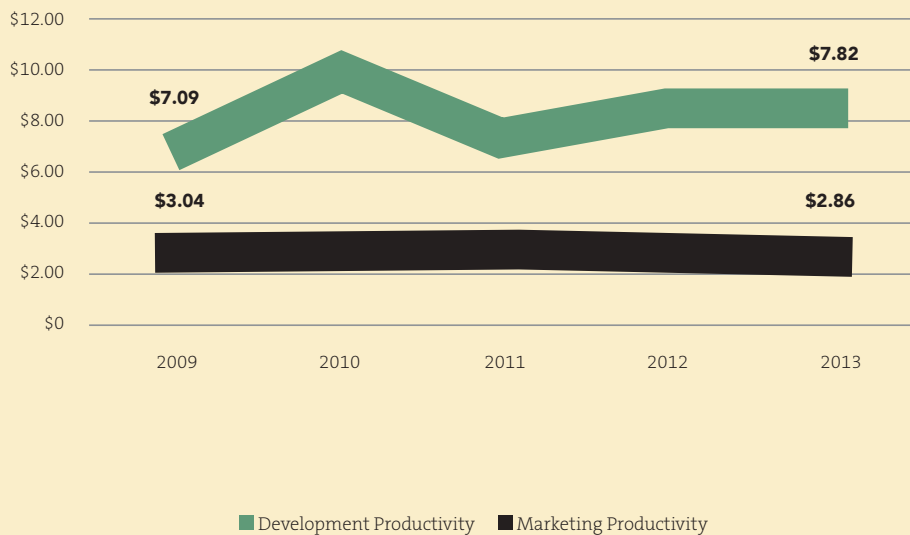


# LEVEL 1 PRODUCTIVITY

## PROGRAM COVERAGE — LEVEL 1



## AVERAGE DEVELOPMENT AND MARKETING PRODUCTIVITY — LEVEL 1



# LEVEL 2 OVERVIEW

ANNUAL BUDGET BETWEEN \$3,000,000 AND \$10,000,000

# 15 COMPANIES

Constant Sample Group for this survey based on data reported from:

The Atlanta Opera  
Arizona Opera  
Austin Lyric Opera  
Boston Lyric Opera  
Cincinnati Opera  
Fort Worth Opera  
The Glimmerglass Festival  
Hawaii Opera Theatre  
Lyric Opera of Kansas City  
Opera San Jose  
Opera Philadelphia  
Opera Theatre of Saint Louis  
Palm Beach Opera  
Pittsburgh Opera  
Portland Opera

Level 2 companies saw average deficits as a percentage of expense drop from a high of 2.3% in 2011 to just over 1% in 2013. Five of the 15 companies in the group posted deficits, compared to 7 in 2012 and 10 in 2009. The number of performances increased, but paid attendance dropped to its lowest average since 2009, a decrease of 20% over the five-year period. Box office revenue dropped by only 14% due to pricing models that increased revenue per ticket but widened the price difference between top-tier and low-tier tickets. Earned revenue related to attendance, including parking, ticket fees and concessions, experienced similar declines. Net earned revenue fell 11.8% between 2012 and 2013, lagging behind 2009 earnings by 6.6%. Increased board, individual and foundation contributions offset most of the earned revenue decline since 2009. Corporate giving grew a substantial 13.2% between 2012 and 2013.

Companies reduced expenses by over 5% between 2012 and 2013, with an average of 56% spent on artistic and production. Marketing/PR/box office expense decreased, while increased development expenditure indicated a greater focus on fundraising. Singer training program expenses saw the most significant reduction since 2009.

As with Level 1 companies, release of purpose-restricted assets supported a larger share of programming. Investment portfolios grew as more assets were channeled into permanently restricted investments. Net assets continued to climb from 2009. Working capital and investments as a percentage of expenses reached a new peak.

## OPERATING NET INCOME

AVERAGE OF U.S. CONSTANT SAMPLE GROUP OF (15) LEVEL 2 COMPANIES

						Pctg. Change		4-yr Annualized Growth Rate
	2009	2010	2011	2012	2013	1-yr	4-yr	
Total Operating Revenue	\$6,065,131	\$6,083,660	\$6,095,831	\$6,585,737	\$6,228,973	-5.4%	2.7%	0.7%
Total Expense	\$6,438,974	\$5,999,616	\$6,238,647	\$6,669,041	\$6,295,737	-5.6%	-2.2%	-0.6%
<b>Operating Net Income</b>	<b>(\$373,844)</b>	<b>\$84,044</b>	<b>(\$142,816)</b>	<b>(\$83,304)</b>	<b>(\$66,764)</b>			
as % of Expense	-5.8%	1.4%	-2.3%	-1.2%	-1.1%			

## BALANCE SHEET

AVERAGE OF U.S. CONSTANT SAMPLE GROUP OF (15) LEVEL 2 COMPANIES

						Pctg. Change		4-yr Annualized Growth Rate
	2009	2010	2011	2012	2013	1-yr	4-yr	
<b>NET ASSETS</b>								
Unrestricted	\$2,245,716	\$2,215,008	\$2,701,204	\$2,113,527	\$2,338,546	10.6%	4.1%	1.0%
Temporarily Restricted	\$2,489,806	\$2,240,572	\$2,635,801	\$2,815,947	\$3,499,309	24.3%	40.5%	8.9%
Permanently Restricted	\$3,925,889	\$4,118,581	\$5,088,244	\$5,086,712	\$5,720,495	12.5%	45.7%	9.9%
<b>Total Net Assets</b>	<b>\$8,661,411</b>	<b>\$8,574,161</b>	<b>\$10,425,249</b>	<b>\$10,016,185</b>	<b>\$11,558,350</b>	<b>15.4%</b>	<b>33.4%</b>	<b>7.5%</b>
as % of Expense	134.5%	142.9%	167.1%	150.2%	183.6%			
<b>Working Capital</b>	<b>(\$704,424)</b>	<b>(\$536,824)</b>	<b>\$104,269</b>	<b>\$129,563</b>	<b>\$244,420</b>	<b>88.6%</b>		
as % of Expense	-10.9%	-8.9%	1.7%	1.9%	3.9%			
<b>Investments *</b>	<b>\$5,766,423</b>	<b>\$5,834,689</b>	<b>\$6,241,653</b>	<b>\$7,553,928</b>	<b>\$8,253,000</b>	<b>21.0%</b>	<b>43.1%</b>	<b>9.4%</b>
as % of Expense	89.6%	97.3%	100.0%	113.3%	131.1%			
<b>Net Fixed Assets</b>	<b>\$2,950,140</b>	<b>\$2,751,832</b>	<b>\$2,596,935</b>	<b>\$1,983,963</b>	<b>\$2,094,126</b>	<b>5.6%</b>	<b>-29.0%</b>	<b>-8.2%</b>

\* Including Separately Incorporated Endowments

# LEVEL 2 PERFORMANCE ACTIVITY

**490,168**  
2013 TOTAL ATTENDANCE\*  
FOR CONSTANT SAMPLE GROUP

## PERFORMANCE ACTIVITY

AVERAGE OF U.S. CONSTANT SAMPLE GROUP OF (15) LEVEL 2 COMPANIES

	2009	2010	2011	2012	2013
<b>PERFORMANCE ACTIVITY</b>					
Main Season Productions	3.7	4.0	4.2	3.9	4.0
Main Season Performances	18.4	18.6	17.7	18.8	20.1
<b>ATTENDANCE</b>					
Main Season Paid Attendance	25,619	25,369	23,167	22,154	20,507
Total Seats Available	34,566	34,460	33,509	30,637	30,638
% of Capacity Sold	74.1%	73.6%	69.1%	72.3%	66.9%
Subscription Renewal Rate	72.0%	65.3%	69.1%	73.8%	73.9%
<b>PRICING</b>					
High Full Subscription Price	\$511	\$581	\$501	\$533	\$587
Low Full Subscription Price	\$77	\$88	\$102	\$99	\$81
High Single Ticket Price	\$155	\$162	\$154	\$166	\$174
Low Single Ticket Price	\$16	\$12	\$12	\$12	\$13
High Orchestra Ticket Price	\$173	\$161	\$147	\$161	\$174
Low Orchestra Ticket Price	\$62	\$43	\$43	\$42	\$35

\* Does not include virtual attendance through radio, TV, live streams or cinemas.



KELLY & MASSA

Opera Philadelphia's *Nabucco* with the Opera Philadelphia chorus. Conducted by Corrado Rovaris and directed by Thaddeus Strassberger. Scenic design by Thaddeus Strassberger, costume design by Mattie Ullrich, and lighting design by Jax Messenger and Mark McCullough.

# LEVEL 2 REVENUE

# \$93,434,597

## 2013 TOTAL OPERATING REVENUE

FOR CONSTANT SAMPLE GROUP

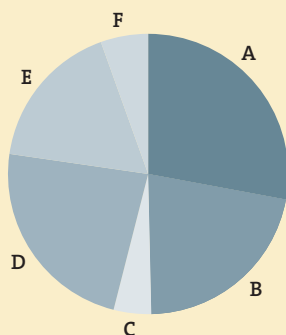
### OPERATING REVENUE

AVERAGE OF U.S. CONSTANT SAMPLE GROUP OF (15) LEVEL 2 COMPANIES

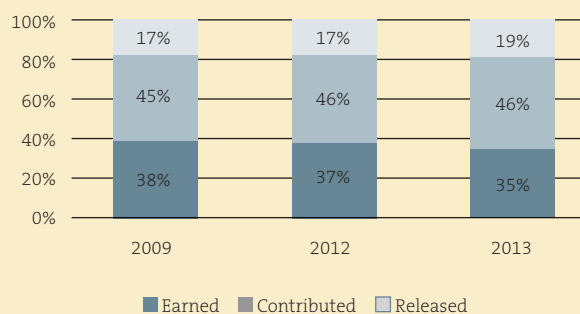
	2009	2012	2013	Pctg Change		4-yr Annualized Growth Rate
				1-yr	4-yr	
<b>UNRESTRICTED EARNED REVENUE</b>						
Box Office	\$1,932,027	\$1,689,281	\$1,662,911	-1.6%	-13.9%	-3.7%
Investment	(\$53,672)	\$309,963	\$248,909	-19.7%		
Other Earned	\$450,820	\$467,244	\$264,224	-43.5%	-41.4%	-12.5%
<b>Total Unrestricted Earned Revenue</b>	<b>\$2,329,175</b>	<b>\$2,466,488</b>	<b>\$2,176,043</b>	<b>-11.8%</b>	<b>-6.6%</b>	<b>-1.7%</b>
<b>UNRESTRICTED CONTRIBUTED REVENUE</b>						
<b>Private Support</b>						
Individual	\$781,284	\$807,837	\$805,402	-0.3%	3.1%	0.8%
Board	\$594,674	\$660,242	\$626,434	-5.1%	5.3%	1.3%
Corporate	\$159,893	\$110,343	\$124,944	13.2%	-21.9%	-6.0%
Foundation	\$480,208	\$781,207	\$672,495	-13.9%	40.0%	8.8%
Other Private Support	\$476,131	\$544,288	\$496,953	-8.7%	4.4%	1.1%
<b>Total Unrestricted Private Support</b>	<b>\$2,492,190</b>	<b>\$2,903,918</b>	<b>\$2,726,228</b>	<b>-6.1%</b>	<b>9.4%</b>	<b>2.3%</b>
<b>Total Unrestricted Government Support</b>	<b>\$197,892</b>	<b>\$93,566</b>	<b>\$158,058</b>	<b>68.9%</b>	<b>-20.1%</b>	<b>-5.5%</b>
<b>Total Unrestricted Contributed Revenue</b>	<b>\$2,690,082</b>	<b>\$2,997,484</b>	<b>\$2,884,286</b>	<b>-3.8%</b>	<b>7.2%</b>	<b>1.8%</b>
<b>Net Assets Released From Restriction and Transfers/Reclassifications</b>	<b>\$1,045,874</b>	<b>\$1,121,766</b>	<b>\$1,168,644</b>	<b>4.2%</b>	<b>11.7%</b>	<b>2.8%</b>
<b>Total Operating Revenue</b>	<b>\$6,065,131</b>	<b>\$6,585,737</b>	<b>\$6,228,973</b>	<b>-5.4%</b>	<b>2.7%</b>	<b>0.7%</b>

### 2013 CONTRIBUTED REVENUE SOURCES

A Individual	\$805,402
B Board	\$626,434
C Corporate	\$124,944
D Foundation	\$672,495
E Other Private Support	\$496,953
F Government	\$158,058
<b>TOTAL</b>	<b>\$2,884,286</b>



### PERCENT OF TOTAL OPERATING REVENUE



# LEVEL 2 EXPENSES

# \$94,436,060

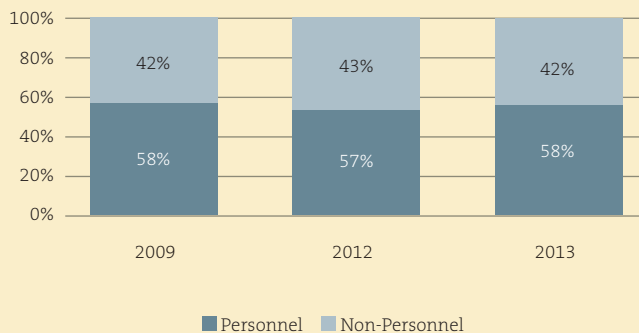
**2013 TOTAL EXPENSE**  
FOR CONSTANT SAMPLE GROUP

## EXPENSES

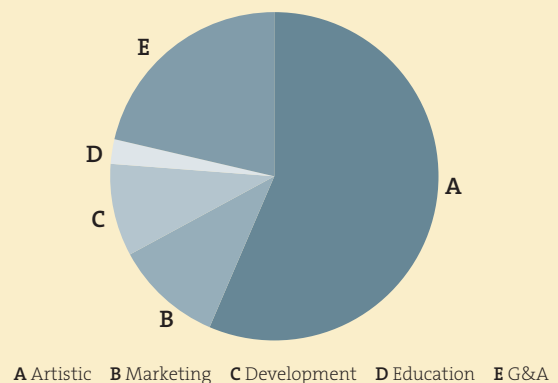
AVERAGE OF U.S. CONSTANT SAMPLE GROUP OF (15) LEVEL 2 COMPANIES

	2009	2012	2013	Pctg. Change		4-yr Annualized Growth Rate
				1-yr	4-yr	
<b>PERSONNEL</b>						
Artistic	\$1,714,766	\$1,724,963	\$1,642,896	-4.8%	-4.2%	-1.1%
Production and Technical	\$792,928	\$832,491	\$850,132	2.1%	7.2%	1.8%
Singer Training	\$36,595	\$35,080	\$27,511	-21.6%	-24.8%	-6.9%
Marketing/PR/Box Office	\$292,469	\$276,955	\$244,237	-11.8%	-16.5%	-4.4%
Development	\$307,624	\$315,778	\$336,748	6.6%	9.5%	2.3%
Education	\$97,143	\$85,168	\$83,427	-2.0%	-14.1%	-3.7%
General and Administrative	\$492,207	\$512,584	\$493,268	-3.8%	0.2%	0.1%
<b>Total Personnel Expense</b>	<b>\$3,733,731</b>	<b>\$3,783,019</b>	<b>\$3,678,219</b>	<b>-2.8%</b>	<b>-1.5%</b>	<b>-0.4%</b>
<b>NON-PERSONNEL</b>						
Production	\$1,008,040	\$1,008,459	\$972,596	-3.6%	-3.5%	-0.9%
Singer Training	\$203	\$88	\$99	12.3%	-51.0%	-16.3%
Broadcasting, Recording and Internet Expense	\$45,374	\$19,293	\$24,625	27.6%	-45.7%	-14.2%
Marketing/PR/Box Office	\$503,358	\$482,295	\$447,989	-7.1%	-11.0%	-2.9%
Development	\$344,944	\$291,126	\$317,151	8.9%	-8.1%	-2.1%
Education	\$78,963	\$48,103	\$41,687	-13.3%	-47.2%	-14.8%
General and Administrative	\$724,361	\$1,036,658	\$813,371	-21.5%	12.3%	2.9%
<b>Total Non-Personnel Expense</b>	<b>\$2,705,243</b>	<b>\$2,886,022</b>	<b>\$2,617,518</b>	<b>-9.3%</b>	<b>-3.2%</b>	<b>-0.8%</b>
<b>Total Expense</b>	<b>\$6,438,974</b>	<b>\$6,669,041</b>	<b>\$6,295,737</b>	<b>-5.6%</b>	<b>-2.2%</b>	<b>-0.6%</b>

### PERCENT OF TOTAL EXPENSES

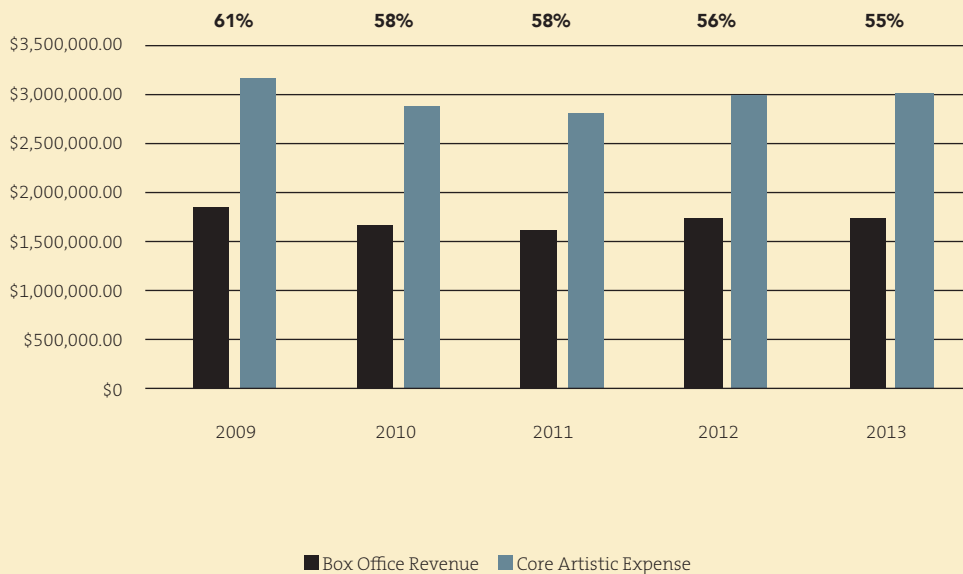


### 2013 EXPENSE BREAKDOWN

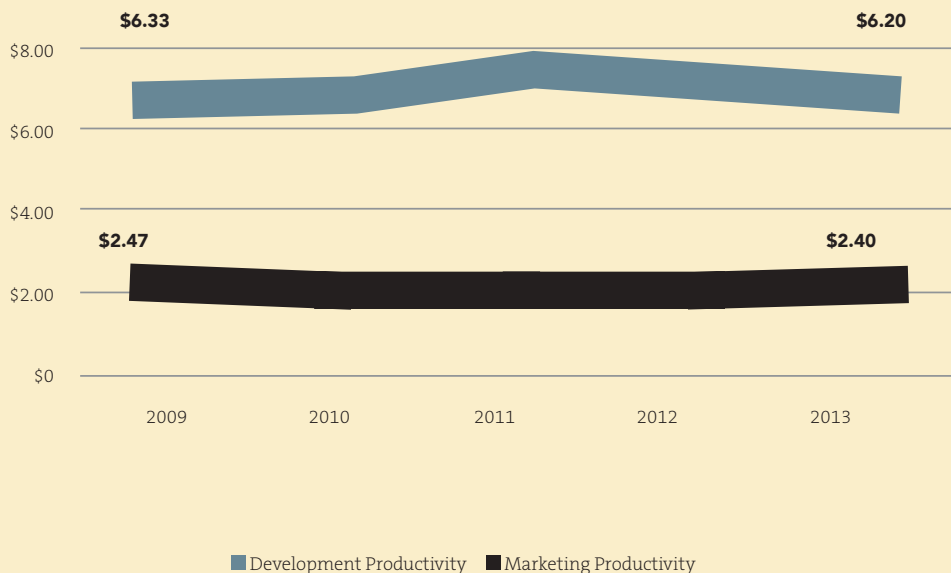


# LEVEL 2 PRODUCTIVITY

## PROGRAM COVERAGE — LEVEL 2



## AVERAGE DEVELOPMENT AND MARKETING PRODUCTIVITY — LEVEL 2



# LEVEL 3 OVERVIEW

ANNUAL BUDGET BETWEEN \$1,000,000 AND \$3,000,000

# 11 COMPANIES

Constant Sample Group for this survey  
based on data reported from:

Amarillo Opera  
Florentine Opera Company  
Gotham Chamber Opera  
Indianapolis Opera  
Kentucky Opera  
Long Beach Opera  
Madison Opera  
Nashville Opera  
Opera Omaha  
Pensacola Opera  
Tulsa Opera

Level 3 companies showed the largest increase in mainstage paid attendance — a 30.4% jump over 2012 and the highest attendance since 2009. While there was an equally large increase in productivity, both in the number of productions and performances, capacity utilization still showed room for growth in ticket sales. However, due to reductions in subscription ticket prices and a slightly lower renewal rate, ticket sales brought in less revenue per dollar spent on marketing and PR than they did in 2011 and 2012. The largest increases in revenue derived from investment earnings and increased support from individual (non-board) donors. Box office earnings accounted for less than 20% of revenue.

Expenses were reduced in 2013 in production and technical personnel, marketing staff, and education and singer training programs, as limited resources were increasingly directed toward artistic and fundraising expenses. However, Level 3 companies were at risk as investments (as a percentage of expense) dropped below 2011 levels and ticket revenue covered only 32% of production expenses — the lowest point in the 5-year reporting cycle.

The average deficit climbed to 7.2% of expense, the highest since 2009. Though the data represents averages for the category, 2 of the 11 companies in the CSG significantly improved net results, moving into surpluses for the first time in 4 years.

## OPERATING NET INCOME

AVERAGE OF U.S. CONSTANT SAMPLE GROUP OF (11) LEVEL 3 COMPANIES

	2009	2010	2011	2012	2013	Pctg. Change		4-yr Annualized Growth Rate
						1-yr	4-yr	
Total Operating Revenue	\$1,935,783	\$2,042,418	\$1,951,466	\$2,129,467	\$2,165,892	1.7%	11.9%	2.8%
Total Expense	\$2,100,115	\$1,989,637	\$2,028,084	\$2,176,098	\$2,334,568	7.3%	11.2%	2.7%
<b>Operating Net Income</b>	<b>(\$164,332)</b>	<b>\$52,781</b>	<b>(\$76,618)</b>	<b>(\$46,631)</b>	<b>(\$168,676)</b>			
as % of Expense	-7.8%	2.7%	-3.8%	-2.1%	-7.2%			

## BALANCE SHEET

AVERAGE OF U.S. CONSTANT SAMPLE GROUP OF (11) LEVEL 3 COMPANIES

	2009	2010	2011	2012	2013	Pctg. Change		4-yr Annualized Growth Rate
						1-yr	4-yr	
<b>NET ASSETS</b>								
Unrestricted	\$604,177	\$882,700	\$595,729	\$643,205	\$762,550	18.6%	26.2%	6.0%
Temporarily Restricted	\$848,982	\$845,966	\$812,518	\$769,243	\$911,567	18.5%	7.4%	1.8%
Permanently Restricted	\$203,820	\$246,430	\$253,662	\$273,316	\$315,426	15.4%	54.8%	11.5%
<b>Total Net Assets</b>	<b>\$1,656,978</b>	<b>\$1,975,095</b>	<b>\$1,661,908</b>	<b>\$1,685,765</b>	<b>\$1,989,543</b>	<b>18.0%</b>	<b>20.1%</b>	<b>4.7%</b>
as % of Expense	78.9%	99.3%	81.9%	77.5%	85.2%			
<b>Working Capital</b>	<b>(\$200,456)</b>	<b>\$74,591</b>	<b>(\$76,057)</b>	<b>(\$260,941)</b>	<b>(\$233,055)</b>	<b>10.7%</b>	<b>-16.3%</b>	<b>3.8%</b>
as % of Expense	-9.5%	3.7%	-3.8%	-12.0%	-10.0%			
<b>Investments *</b>	<b>\$848,171</b>	<b>\$909,218</b>	<b>\$1,029,239</b>	<b>\$889,215</b>	<b>\$937,193</b>	<b>5.4%</b>	<b>10.5%</b>	<b>2.5%</b>
as % of Expense	40.4%	45.7%	50.7%	40.9%	40.1%			
<b>Net Fixed Assets</b>	<b>\$804,633</b>	<b>\$808,109</b>	<b>\$671,785</b>	<b>\$904,146</b>	<b>\$995,605</b>	<b>10.1%</b>	<b>23.7%</b>	<b>5.5%</b>

\* Including Separately Incorporated Endowments

# LEVEL 3 PERFORMANCE ACTIVITY

# 195,538

**2013 TOTAL ATTENDANCE\***  
FOR CONSTANT SAMPLE GROUP

## PERFORMANCE ACTIVITY

AVERAGE OF U.S. CONSTANT SAMPLE GROUP OF (11) LEVEL 3 COMPANIES

	2009	2010	2011	2012	2013
<b>PERFORMANCE ACTIVITY</b>					
Main Season Productions	3.3	2.7	3.0	3.3	3.8
Main Season Performances	7.5	6.9	9.5	8.6	10.3
<b>ATTENDANCE</b>					
Main Season Paid Attendance	7,858	6,768	6,814	6,334	8,262
Total Seats Available	11,747	10,730	11,334	10,479	13,344
% of Capacity Sold	66.9%	63.1%	60.1%	60.4%	61.9%
Subscription Renewal Rate	79.7%	67.4%	87.2%	80.0%	75.8%
<b>PRICING</b>					
High Full Subscription Price	\$343	\$349	\$245	\$277	\$242
Low Full Subscription Price	\$64	\$91	\$76	\$63	\$57
High Single Ticket Price	\$102	\$107	\$98	\$109	\$115
Low Single Ticket Price	\$14	\$14	\$14	\$15	\$15
High Orchestra Ticket Price	\$94	\$103	\$93	\$100	\$112
Low Orchestra Ticket Price	\$38	\$44	\$36	\$30	\$23

\* Does not include virtual attendance through radio, TV, live streams or cinemas.



SCOTT KIMMINS



# LEVEL 3 REVENUE

# \$21,976,475

## 2013 TOTAL OPERATING REVENUE

FOR CONSTANT SAMPLE GROUP

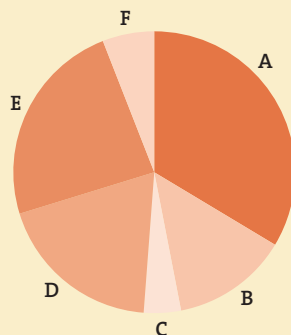
### OPERATING REVENUE

AVERAGE OF U.S. CONSTANT SAMPLE GROUP OF (11) LEVEL 3 COMPANIES

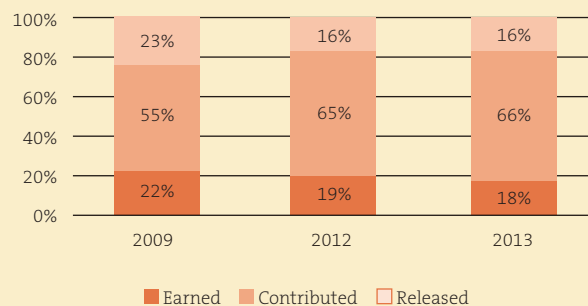
	2009	2012	2013	Pctg. Change		4-yr Annualized Growth Rate
				1-yr	4-yr	
<b>UNRESTRICTED EARNED REVENUE</b>						
Box Office	\$398,662	\$357,376	\$341,009	-4.6%	-14.5%	-3.8%
Investment	(\$76,669)	\$7,859	\$91,575	1065.2%		
Other Earned	\$102,989	\$79,850	\$76,700	-3.9%	-25.5%	-7.1%
<b>Total Unrestricted Earned Revenue</b>	<b>\$424,983</b>	<b>\$445,085</b>	<b>\$509,284</b>	<b>14.4%</b>	<b>19.8%</b>	<b>4.6%</b>
<b>UNRESTRICTED CONTRIBUTED REVENUE</b>						
<b>Private Support</b>						
Individual	\$194,997	\$323,552	\$422,018	30.4%	116.4%	21.3%
Board	\$153,408	\$159,363	\$167,489	5.1%	9.2%	2.2%
Corporate	\$66,778	\$52,078	\$53,507	2.7%	-19.9%	-5.4%
Foundation	\$169,305	\$235,473	\$239,150	1.6%	41.3%	9.0%
Other Private Support	\$395,998	\$375,950	\$299,038	-20.5%	-24.5%	-6.8%
<b>Total Unrestricted Private Support</b>	<b>\$980,486</b>	<b>\$1,146,416</b>	<b>\$1,181,202</b>	<b>3.0%</b>	<b>20.5%</b>	<b>4.8%</b>
<b>Total Unrestricted Government Support</b>	<b>\$65,041</b>	<b>\$72,704</b>	<b>\$74,620</b>	<b>2.6%</b>	<b>14.7%</b>	<b>3.5%</b>
<b>Total Unrestricted Contributed Revenue</b>	<b>\$1,045,528</b>	<b>\$1,219,121</b>	<b>\$1,255,822</b>	<b>3.0%</b>	<b>20.1%</b>	<b>4.7%</b>
<b>Net Assets Released From</b>						
Restriction and Transfers/Reclassifications	\$465,273	\$465,262	\$400,787	-13.9%	-13.9%	-3.7%
<b>Total Operating Revenue</b>	<b>\$1,935,783</b>	<b>\$2,129,467</b>	<b>\$2,165,892</b>	<b>1.7%</b>	<b>11.9%</b>	<b>2.8%</b>

### 2013 CONTRIBUTED REVENUE SOURCES

A Individual	\$422,018
B Board	\$167,489
C Corporate	\$53,507
D Foundation	\$239,150
E Other Private Support	\$299,038
F Government	\$74,620
<b>TOTAL</b>	<b>\$1,255,822</b>



### PERCENT OF TOTAL OPERATING REVENUE



LEFT: Dayton Opera's *Aida* with (l-r) Grant Youngblood (Armonasro), Indira Mahajan (Aida), Kenneth Shaw (King of Egypt), Layna Chianakas (Amneris), John Pickle (Radames), Harold Wilson (Ramfis) and the Dayton Opera chorus. Conducted by Neal Gittleman and directed by Kathleen Clawson. Scenic design by Roberto Oswald for Opera Carolina, costume design by Annibal Lapiz for Opera Carolina and lighting design by John Rensel.

# LEVEL 3 EXPENSES

# \$22,228,847

## 2013 TOTAL EXPENSE

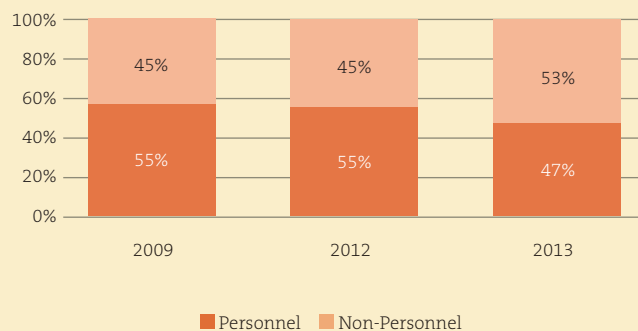
FOR CONSTANT SAMPLE GROUP

### EXPENSES

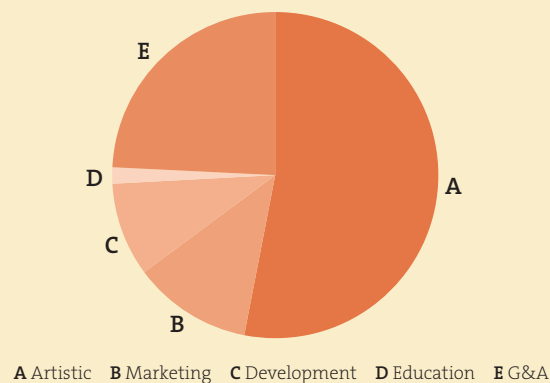
AVERAGE OF U.S. CONSTANT SAMPLE GROUP OF (11) LEVEL 3 COMPANIES

	2009	2012	2013	Pctg. Change		4-yr Annualized Growth Rate
				1-yr	4-yr	
<b>PERSONNEL</b>						
Artistic	\$488,070	\$399,418	\$487,021	21.9%	-0.2%	-0.1%
Production and Technical	\$198,921	\$232,066	\$199,821	-13.9%	0.5%	0.1%
Singer Training	\$26,760	\$116,540	\$41,510	-64.4%	55.1%	11.6%
Marketing/PR/Box Office	\$92,058	\$87,225	\$70,340	-19.4%	-23.6%	-6.5%
Development	\$111,146	\$106,461	\$113,368	6.5%	2.0%	0.5%
Education	\$47,013	\$57,881	\$25,210	-56.4%	-46.4%	-14.4%
General and Administrative	\$189,819	\$165,153	\$189,590	14.8%	-0.1%	0.0%
<b>Total Personnel Expense</b>	<b>\$1,153,788</b>	<b>\$1,164,743</b>	<b>\$1,126,859</b>	<b>-3.3%</b>	<b>-2.3%</b>	<b>-0.6%</b>
<b>NON-PERSONNEL</b>						
Production	\$318,039	\$343,281	\$496,558	44.7%	56.1%	11.8%
Singer Training	\$26,833	\$66,223	\$13,559	-79.5%	-49.5%	-15.7%
Broadcasting, Recording and Internet Expense	\$0	\$257	\$0	-100.0%	0.0%	0.0%
Marketing/PR/Box Office	\$217,999	\$186,907	\$204,939	9.6%	-6.0%	-1.5%
Development	\$94,529	\$103,846	\$104,085	0.2%	10.1%	2.4%
Education	\$37,395	\$40,933	\$12,467	-69.5%	-66.7%	-24.0%
General and Administrative	\$251,532	\$269,908	\$376,100	39.3%	49.5%	10.6%
<b>Total Non-Personnel Expense</b>	<b>\$946,326</b>	<b>\$1,011,355</b>	<b>\$1,207,708</b>	<b>19.4%</b>	<b>27.6%</b>	<b>6.3%</b>
<b>Total Expense</b>	<b>\$2,100,115</b>	<b>\$2,176,098</b>	<b>\$2,334,568</b>	<b>7.3%</b>	<b>11.2%</b>	<b>2.7%</b>

### PERCENT OF TOTAL EXPENSES

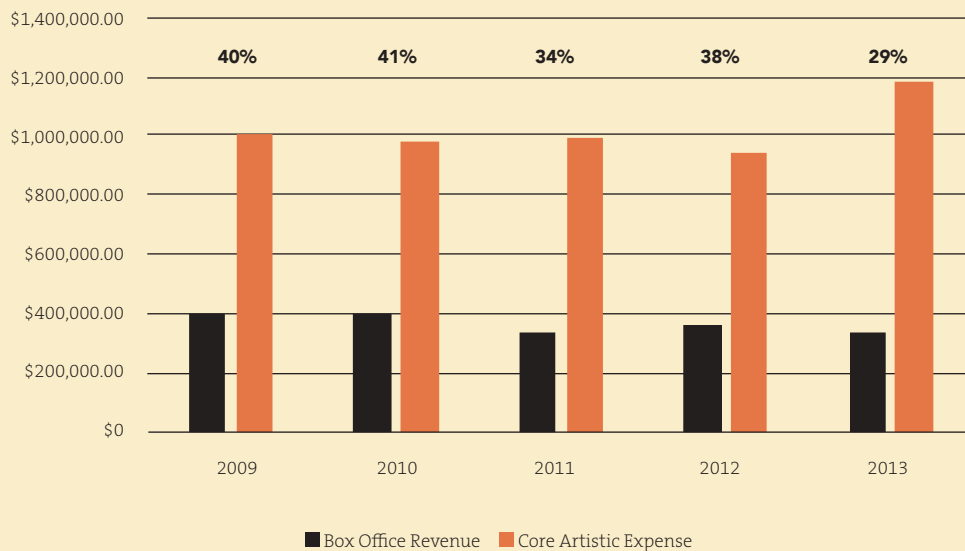


### 2013 EXPENSE BREAKDOWN

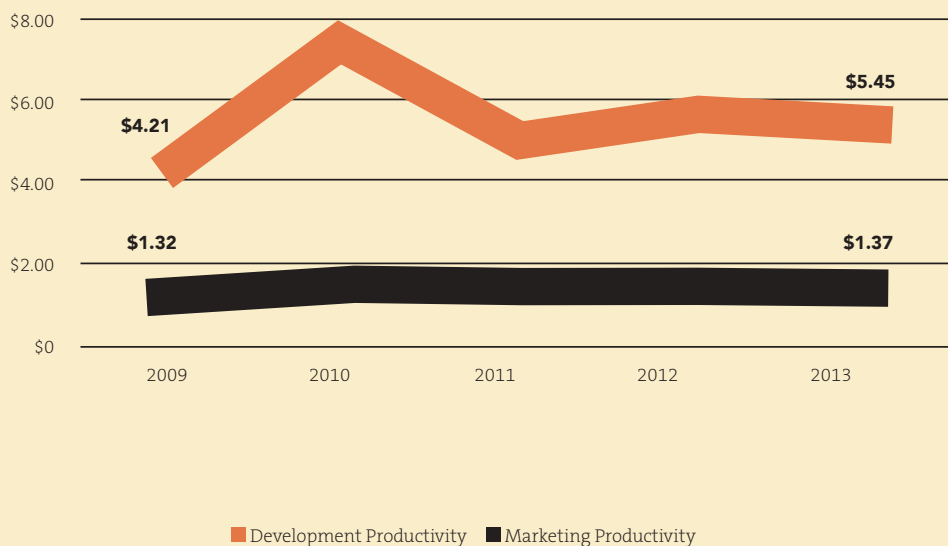


# LEVEL 3 PRODUCTIVITY

## PROGRAM COVERAGE — LEVEL 3



## AVERAGE DEVELOPMENT AND MARKETING PRODUCTIVITY — LEVEL 3



# LEVEL 4 OVERVIEW

ANNUAL BUDGET UNDER \$1,000,000

# 12 COMPANIES

Constant Sample Group for this survey based on data reported from:

American Opera Projects  
Chautauqua Opera  
Encompass New Opera Theatre  
Festival Opera  
Mississippi Opera  
Mobile Opera  
Music-Theatre Group  
Opera Columbus  
Opera North  
Piedmont Opera  
Opera Theater of Pittsburgh  
Tri-Cities Opera Company

**A**verage paid attendance in 2013 for Level 4 companies was the highest since 2009. The number of productions dropped slightly in 2013 after a sharp increase in 2012, bringing capacity levels to pre-2009 levels. Subscription renewal rates dropped to 65.8% from 82.3% in 2012, with an overall drop in ticket revenue by 7.5% despite increased audience sizes. Reductions in investment gains to nearly zero brought earned revenue down by 10% below 2012 – nearly 50% below the earnings in 2009. Special event fundraising is the only revenue stream that increased between 2012 and 2013.

Overall, expenses were reduced by almost 3% from 2012. Cuts in artistic and production and in development were offset by significant increases in education and in general and administrative. Non-personnel costs were an increasingly higher percentage of operating expenses over the past 5 years, now almost equal to personnel expenses (including performers and creators). Significantly, Level 4 companies now spend over four times the amount spent on education than in 2009, raising it to an average of 5% of budget.

Surpluses and deficits at this level are almost completely tied to the increases and decreases in the number of performances produced. While working capital is faring better than it has over the past 5 years and net assets have increased slightly, investments have been reduced to their lowest levels since 2009.

## OPERATING NET INCOME

AVERAGE OF U.S. CONSTANT SAMPLE GROUP OF (12) LEVEL 4 COMPANIES

						Pctg. Change		4-yr Annualized Growth Rate
	2009	2010	2011	2012	2013	1-yr	4-yr	
Total Operating Revenue	\$774,178	\$605,949	\$630,370	\$560,303	\$596,532	6.5%	-22.9%	-6.3%
Total Expense	\$808,113	\$631,375	\$609,144	\$589,289	\$573,898	-2.6%	-29.0%	-8.2%
<b>Operating Net Income</b>	<b>(\$33,936)</b>	<b>(\$25,426)</b>	<b>\$21,226</b>	<b>(\$28,985)</b>	<b>\$22,634</b>			
as % of Expense	-4.2%	-4.0%	3.5%	-4.9%	3.9%			

## BALANCE SHEET

AVERAGE OF U.S. CONSTANT SAMPLE GROUP OF (11\*\*) LEVEL 4 COMPANIES

						Pctg. Change		4-yr Annualized Growth Rate
	2009	2010	2011	2012	2013	1-yr	4-yr	
<b>NET ASSETS</b>								
Unrestricted	(\$1,639)	\$28,037	\$23,554	\$21,999	\$51,986	136.3%		
Temporarily Restricted	\$163,049	\$70,725	\$108,165	\$108,317	\$83,131	-23.3%	-49.0%	-15.5%
Permanently Restricted	\$100,263	\$149,938	\$91,663	\$91,948	\$91,203	-0.8%	-9.0%	-2.3%
<b>Total Net Assets</b>	<b>\$261,673</b>	<b>\$248,700</b>	<b>\$223,381</b>	<b>\$222,263</b>	<b>\$226,320</b>	<b>1.8%</b>	<b>-13.5%</b>	<b>-3.6%</b>
as % of Expense	32.4%	39.4%	36.7%	37.7%	39.4%			
<b>Working Capital</b>	<b>(\$136,903)</b>	<b>(\$119,354)</b>	<b>(\$87,708)</b>	<b>(\$76,895)</b>	<b>(\$30,162)</b>			
as % of Expense	-16.9%	-18.9%	-14.4%	-13.0%	-5.3%			
<b>Investments *</b>	<b>\$152,944</b>	<b>\$120,862</b>	<b>\$148,837</b>	<b>\$134,259</b>	<b>\$109,653</b>	<b>-18.3%</b>	<b>-28.3%</b>	<b>-8.0%</b>
as % of Expense	18.9%	19.1%	24.4%	22.8%	19.1%			
<b>Net Fixed Assets</b>	<b>\$135,264</b>	<b>\$147,391</b>	<b>\$111,262</b>	<b>\$98,894</b>	<b>\$82,149</b>	<b>-16.9%</b>	<b>-39.3%</b>	<b>-11.7%</b>

\* Including Separately Incorporated Endowments \*\* Chautauqua Opera does not report Balance Sheet data.

# LEVEL 4 PERFORMANCE ACTIVITY

# 93,404

**2013 TOTAL ATTENDANCE\***  
FOR CONSTANT SAMPLE GROUP

## PERFORMANCE ACTIVITY

AVERAGE OF U.S. CONSTANT SAMPLE GROUP OF (12) LEVEL 4 COMPANIES

	2009	2010	2011	2012	2013
<b>PERFORMANCE ACTIVITY</b>					
Main Season Productions	3.1	3.7	3.4	4.5	4.3
Main Season Performances	7.6	8.7	8.3	9.1	8.8
<b>ATTENDANCE</b>					
Main Season Paid Attendance	4,719	3,440	3,641	2,921	3,767
Total Seats Available	7,497	6,959	6,174	5,928	5,280
% of Capacity Sold	62.9%	49.4%	59.0%	49.3%	71.3%
Subscription Renewal Rate	85.2%	76.2%	59.4%	82.3%	65.8%
<b>PRICING</b>					
High Full Subscription Price	\$188	\$170	\$147	\$169	\$212
Low Full Subscription Price	\$45	\$34	\$58	\$96	\$100
High Single Ticket Price	\$70	\$74	\$65	\$80	\$68
Low Single Ticket Price	\$11	\$11	\$9	\$10	\$11
High Orchestra Ticket Price	\$71	\$68	\$69	\$89	\$71
Low Orchestra Ticket Price	\$36	\$34	\$35	\$39	\$30

\* Does not include virtual attendance through radio, TV, live streams or cinemas.



JOHN BORGHE

Fargo-Moorhead Opera's *The Merry Widow* with Holly Janz (Valencienne) and Stella Zambalis (Hanna Glawar). Conducted by Stephen Sulich and directed by Jeff Kingsbury.

# LEVEL 4 REVENUE

# \$6,664,046

## 2013 TOTAL OPERATING REVENUE

FOR CONSTANT SAMPLE GROUP

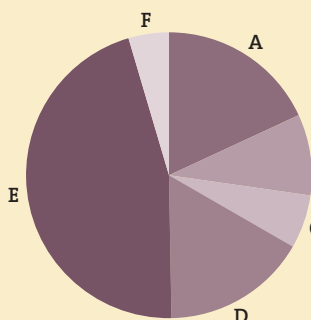
### OPERATING REVENUE

AVERAGE OF U.S. CONSTANT SAMPLE GROUP OF (12) LEVEL 4 COMPANIES

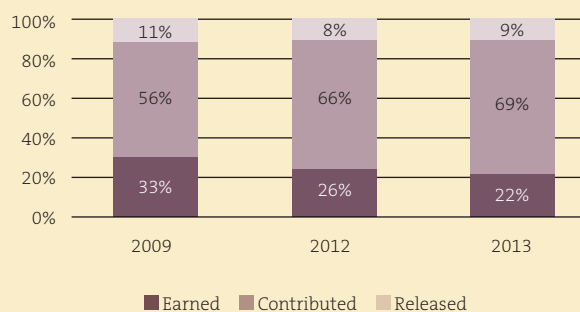
	2009	2012	2013	Pctg. Change		4-yr Annualized Growth Rate
				1-yr	4-yr	
<b>UNRESTRICTED EARNED REVENUE</b>						
Box Office	\$194,501	\$116,318	\$107,608	-7.5%	-44.7%	-13.8%
Investment	\$5,006	\$1,839	\$660	-64.1%	-86.8%	-39.8%
Other Earned	\$57,689	\$27,937	\$22,496	-19.5%	-61.0%	-21.0%
<b>Total Unrestricted Earned Revenue</b>	<b>\$257,196</b>	<b>\$143,766</b>	<b>\$128,889</b>	<b>-10.3%</b>	<b>-49.9%</b>	<b>-15.9%</b>
<b>UNRESTRICTED CONTRIBUTED REVENUE</b>						
<b>Private Support</b>						
Individual	\$98,995.17	\$84,386.25	\$74,592.83	-11.6%	-24.7%	-6.8%
Board	\$65,110.58	\$44,273.17	\$37,792.42	-14.6%	-42.0%	-12.7%
Corporate	\$28,943.08	\$28,715.25	\$24,982.50	-13.0%	-13.7%	-3.6%
Foundation	\$56,542.83	\$65,076.83	\$67,635.92	3.9%	19.6%	4.6%
Other Private Support	\$201,163.92	\$118,179.17	\$188,391.42	59.4%	-6.3%	-1.6%
<b>Total Unrestricted Private Support</b>	<b>\$385,645.00</b>	<b>\$340,630.67</b>	<b>\$393,395.08</b>	<b>15.5%</b>	<b>2.0%</b>	<b>0.5%</b>
<b>Total Unrestricted Government Support</b>	<b>\$49,260.25</b>	<b>\$27,623.17</b>	<b>\$18,871.58</b>	<b>-31.7%</b>	<b>-61.7%</b>	<b>-21.3%</b>
<b>Total Unrestricted Contributed Revenue</b>	<b>\$434,905.25</b>	<b>\$368,253.83</b>	<b>\$412,266.67</b>	<b>12.0%</b>	<b>-5.2%</b>	<b>-1.3%</b>
<b>Net Assets Released From</b>						
Restriction and Transfers/Reclassifications	\$82,075.92	\$48,283.58	\$55,376.75	14.7%	-32.5%	-9.4%
<b>Total Operating Revenue</b>	<b>\$774,177.50</b>	<b>\$560,303.08</b>	<b>\$596,532.17</b>	<b>6.5%</b>	<b>-22.9%</b>	<b>-6.3%</b>

### 2013 CONTRIBUTED REVENUE SOURCES

A Individual	\$74,593
B Board	\$37,792
C Corporate	\$24,983
D Foundation	\$67,636
E Other Private Support	\$188,391
F Government	\$18,872
<b>TOTAL</b>	<b>\$412,267</b>



### PERCENT OF TOTAL OPERATING REVENUE



# LEVEL 4 EXPENSES

# \$6,886,775

## 2013 TOTAL EXPENSE

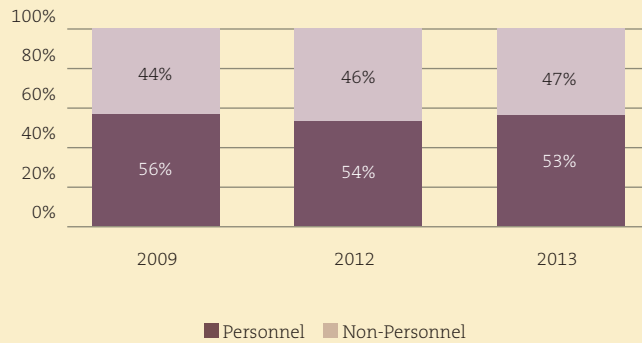
FOR CONSTANT SAMPLE GROUP

### EXPENSES

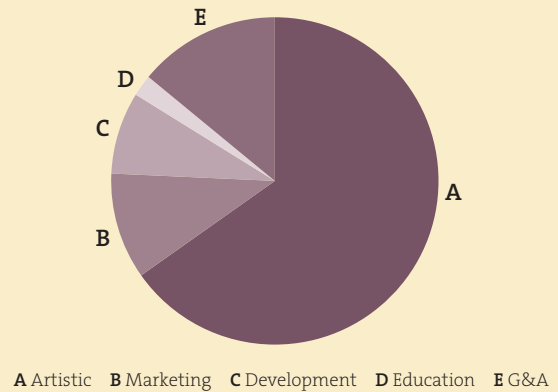
AVERAGE OF U.S. CONSTANT SAMPLE GROUP OF (12) LEVEL 4 COMPANIES

	2009	2012	2013	Pctg. Change		4-yr Annualized Growth Rate
				1-yr	4-yr	
<b>PERSONNEL</b>						
Artistic and Production	\$382,099	\$312,281	\$263,974	-15.5%	-30.9%	-8.8%
Marketing/PR/Box Office	\$74,462	\$38,071	\$36,637	-3.8%	-50.8%	-16.2%
Development	\$87,248	\$44,938	\$37,171	-17.3%	-57.4%	-19.2%
Education	\$5,080	\$20,312	\$29,364	44.6%	478.1%	55.1%
General and Administrative	\$259,225	\$173,686	\$206,635	19.0%	-20.3%	-5.5%
<b>Total Personnel Expense</b>	<b>\$455,932</b>	<b>\$318,859</b>	<b>\$304,989</b>	<b>-4.3%</b>	<b>-33.1%</b>	<b>-9.6%</b>
<b>Total Non-Personnel Expense</b>	<b>\$352,181</b>	<b>\$270,430</b>	<b>\$268,909</b>	<b>-0.6%</b>	<b>-23.6%</b>	<b>-6.5%</b>
<b>Total Expense</b>	<b>\$808,113</b>	<b>\$589,289</b>	<b>\$573,898</b>	<b>-2.6%</b>	<b>-29.0%</b>	<b>-8.2%</b>

### PERCENT OF TOTAL EXPENSES

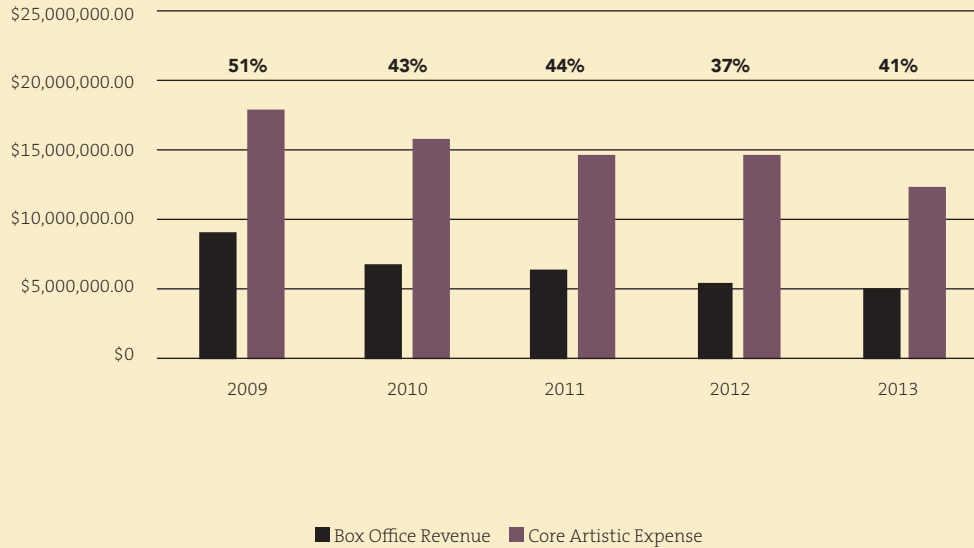


### 2013 EXPENSE BREAKDOWN

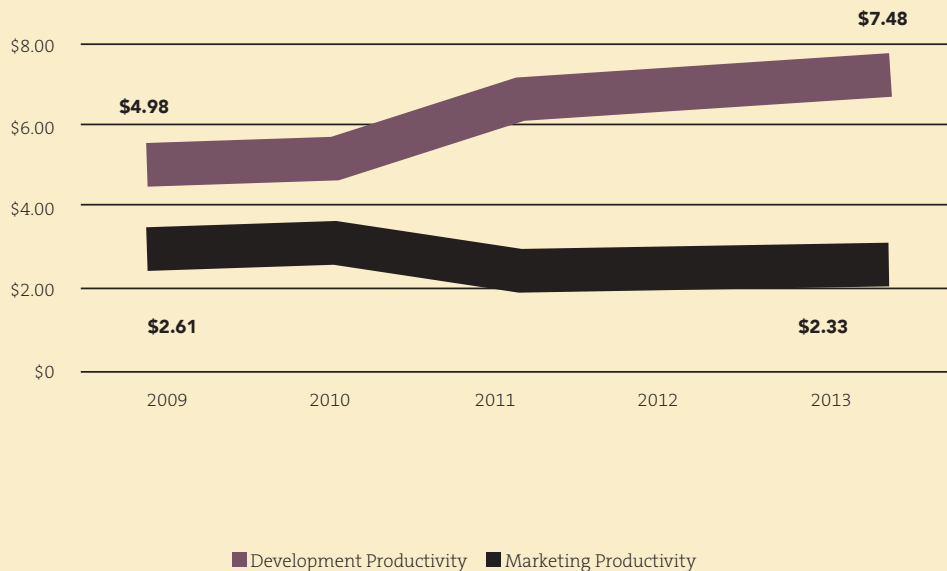


# LEVEL 4 PRODUCTIVITY

## PROGRAM COVERAGE — LEVEL 4



## AVERAGE DEVELOPMENT AND MARKETING PRODUCTIVITY — LEVEL 4





# CANADIAN OVERVIEW

## 8 COMPANIES

Constant Sample Group for this survey based on data reported from:

The Banff Centre  
 Calgary Opera  
 Canadian Opera Company  
 Manitoba Opera  
 Opera Atelier  
 Opéra de Montréal  
 Pacific Opera Victoria  
 Vancouver Opera

**A** focus on individual and board fundraising showed strong results in 2013, with board support increasing to more than four times its 2009 level and nearly twice that of 2012. Corporate funding also increased significantly. With budgets holding steady and ticket revenue dropping, the role of government funding remains critical to Canadian companies. In 2013, 19.1% of the budget was covered through government support, up only slightly from 2009 (18.7%).

Large increases in other earned revenue can be attributed to the incorporation of the Canadian Opera House Company, owners of the Four Seasons Centre, into the Canadian Opera Company's financial statements, which increased assets as well as revenue from parking, rentals and concessions. Expenses relating to debt and maintenance were also added. Removing the Canadian Opera Company from the data pool shows a much steadier course since 2009. Operating revenues remained stable from 2012, with only a 1.3% erosion in earned revenue, a 1% decrease in contributed revenue and a 1.9% increase in expenses.

Half of the 8 companies posted deficits in 2013, compared to only 1 in 2012. Revenue increased an average of 7.2% over 2012, but expenses increased 8.6%, primarily in artistic, production and technical, and general and administration — reducing the average net income. However, the 4-year annualized growth rate is positive, with revenue increasing 4.4% and expense increasing only 4.1%.

### OPERATING NET INCOME

AVERAGE OF CANADIAN CONSTANT SAMPLE GROUP OF (8) COMPANIES

	2009	2010	2011	2012	2013	Pctg. Change		4-yr Annualized Growth Rate
						1-yr	4-yr	
Total Operating Revenue	\$7,740,968	\$7,858,789	\$8,088,215	\$8,578,947	\$9,199,707	7.2%	18.8%	4.4%
Total Expense	\$7,838,326	\$7,852,456	\$8,359,107	\$8,460,412	\$9,191,284	8.6%	17.3%	4.1%
<b>Operating Net Income</b>	<b>(\$97,358)</b>	<b>\$6,333</b>	<b>(\$270,892)</b>	<b>\$118,535</b>	<b>\$8,423</b>			
as % of Expense	-1.2%	0.1%	-3.2%	1.4%	0.1%			

### BALANCE SHEET

AVERAGE OF CANADIAN CONSTANT SAMPLE GROUP OF (7‡) COMPANIES

	2009	2010	2011	2012	2013
<b>NET ASSETS</b>					
Unrestricted	\$39,474	(\$47,681)	(\$252,765)	(\$110,569)	\$3,687,094
Temporarily Restricted	\$0	\$65,807	\$0	\$0	\$84,125
Permanently Restricted	\$3,684	\$3,684	\$3,689	\$14,823	\$75,710
<b>Total Net Assets</b>	<b>\$43,158</b>	<b>\$21,810</b>	<b>(\$249,076)</b>	<b>(\$95,746)</b>	<b>\$3,846,929</b>
as % of Expense	0.6%	0.3%	-3.0%	-1.1%	41.9%
<b>Working Capital</b>	<b>(\$331,569)</b>	<b>(\$416,133)</b>	<b>(\$684,697)</b>	<b>(\$532,654)</b>	<b>(\$14,720,997)</b>
as % of Expense	-4.2%	-5.3%	-8.2%	-6.3%	-160.2%
<b>Investments *</b>	<b>\$4,101,095</b>	<b>\$3,282,720</b>	<b>\$4,350,118</b>	<b>\$4,389,064</b>	<b>\$4,641,001</b>
as % of Expense	52.3%	41.8%	52.0%	51.9%	50.5%
<b>Net Fixed Assets**</b>	<b>\$371,043</b>	<b>\$368,452</b>	<b>\$431,931</b>	<b>\$422,085</b>	<b>\$18,408,091</b>

‡ The Banff Centre does not report Balance Sheet data.

\* Including Separately Incorporated Endowments

\*\* In FY2013 the Canadian Opera Company consolidated reports to include the Four Seasons Centre, significantly adding to Net Fixed Assets.

# CANADIAN PERFORMANCE ACTIVITY

# 297,095

**2013 TOTAL ATTENDANCE\***  
FOR CONSTANT SAMPLE GROUP

## PERFORMANCE ACTIVITY

AVERAGE OF CANADIAN CONSTANT SAMPLE GROUP OF (8) COMPANIES

	2009	2010	2011	2012	2013
<b>PERFORMANCE ACTIVITY</b>					
Main Season Productions	3.5	3.6	3.9	3.9	3.9
Main Season Performances	20.0	21.4	20.9	19.5	19.4
<b>ATTENDANCE</b>					
Main Season Paid Attendance	38,778	36,224	37,699	32,794	31,076
Total Seats Available	43,359	41,909	48,985	44,368	41,809
% of Capacity Sold	89.4%	86.4%	77.0%	73.9%	74.3%
Subscription Renewal Rate	77.0%	75.8%	80.7%	79.0%	76.0%
<b>PRICING</b>					
High Full Subscription Price	\$521	\$564	\$715	\$725	\$735
Low Full Subscription Price	\$106	\$90	\$143	\$116	\$119
High Single Ticket Price	\$140	\$147	\$151	\$156	\$165
Low Single Ticket Price	\$19	\$21	\$22	\$22	\$22
High Orchestra Ticket Price	\$120	\$94	\$159	\$162	\$176
Low Orchestra Ticket Price	\$50	\$39	\$68	\$42	\$48

\* Does not include virtual attendance through radio, TV, live streams or cinemas.



R. TINKER

Manitoba Opera's *La bohème* with (l-r) Keith Phares (Marcello), David Watson (Benoit), Giles Tomkins (Colline), Peter McGillivray (Schaunard) and Erick Fennell (Rodolfo). Conducted by Daniel Lipton and directed by Brian Deedrick. Scenic design by Wolfram Skalicki, costumes provided by Malabar Ltd. and lighting design by Bill Williams.

# CANADIAN REVENUE

# \$73,597,656

## TOTAL OPERATING REVENUE

FOR CONSTANT SAMPLE GROUP

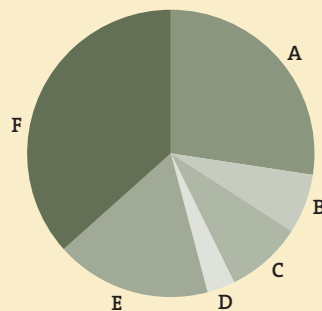
### OPERATING REVENUE

AVERAGE OF CANADIAN CONSTANT SAMPLE GROUP OF (8) COMPANIES

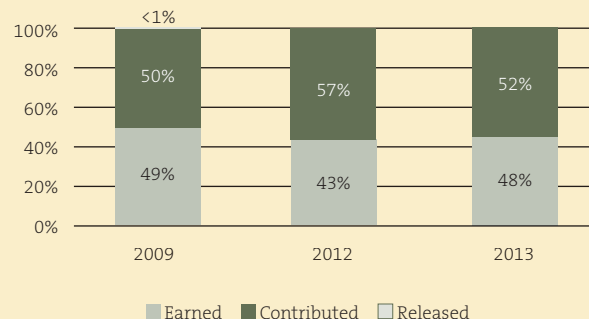
	2009	2012	2013	Pctg. Change		4-yr Annualized Growth Rate
				1-yr	4-yr	
<b>UNRESTRICTED EARNED REVENUE</b>						
Box Office	\$3,072,873	\$2,741,556	\$2,620,969	-4.4%	-14.7%	-3.9%
Investment	\$46,975	\$27,527	\$27,296	-0.8%	-41.9%	-12.7%
Other Earned	\$737,962	\$885,368	\$1,743,997	97%	136.3%	24%
<b>Total Earned Revenue</b>	<b>\$3,857,809</b>	<b>\$3,654,451</b>	<b>\$4,392,262</b>	<b>20.2%</b>	<b>13.9%</b>	<b>3.3%</b>
<b>UNRESTRICTED CONTRIBUTED REVENUE</b>						
<b>Private Support</b>						
Individual	\$1,067,215	\$1,339,889	\$1,316,803	-1.7%	23.4%	5.4%
Board	\$56,925	\$113,427	\$322,192	184.1%	466.0%	54.2%
Corporate	\$389,961	\$339,955	\$415,133	22.1%	6.5%	1.6%
Foundation	\$362,071	\$175,197	\$151,081	-13.8%	-58.3%	-19.6%
Other Private Support	\$535,365	\$1,173,089	\$842,343	-28.2%	57.3%	12.0%
<b>Total Unrestricted Private Support</b>	<b>\$2,411,537</b>	<b>\$3,141,557</b>	<b>\$3,047,552</b>	<b>-3.0%</b>	<b>26.4%</b>	<b>6.0%</b>
<b>Total Unrestricted Government Support</b>	<b>\$1,444,146</b>	<b>\$1,782,939</b>	<b>\$1,759,893</b>	<b>-1.3%</b>	<b>21.9%</b>	<b>5.1%</b>
<b>Total Unrestricted Contributed Revenue</b>	<b>\$3,855,683</b>	<b>\$4,924,496</b>	<b>\$4,807,445</b>	<b>-2.4%</b>	<b>24.7%</b>	<b>5.7%</b>
<b>Net Assets Released From Restriction</b>	<b>\$27,476</b>	<b>\$0</b>	<b>\$0</b>			
<b>Total Operating Revenue</b>	<b>\$7,740,968</b>	<b>\$8,578,947</b>	<b>\$9,199,707</b>	<b>7.2%</b>	<b>18.8%</b>	<b>4.4%</b>

### 2013 CONTRIBUTED REVENUE SOURCES

A Individual	\$1,313,803
B Board	\$322,192
C Corporate	\$415,133
D Foundation	\$151,081
E Other Private Support	\$842,343
F Government	\$1,759,893
<b>TOTAL</b>	<b>\$4,807,455</b>



### PERCENT OF TOTAL OPERATING REVENUE



# CANADIAN EXPENSES

# \$9,191,284

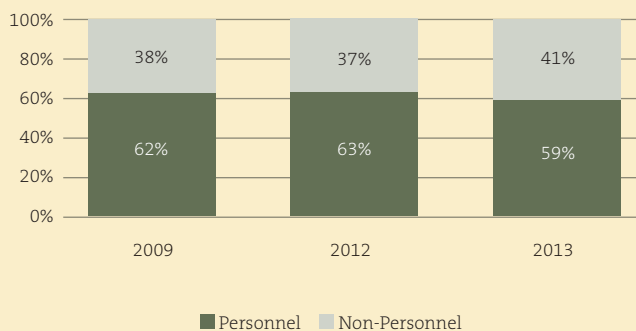
**2013 TOTAL EXPENSE**  
FOR CONSTANT SAMPLE GROUP

## EXPENSES

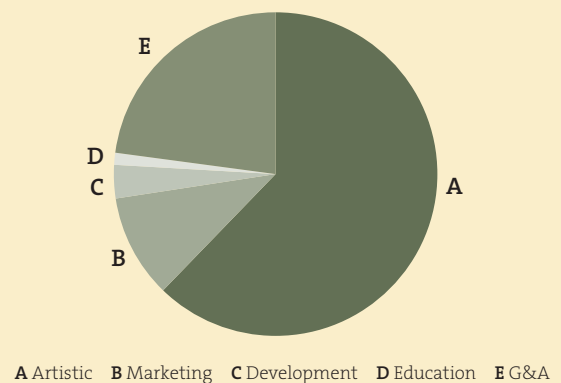
AVERAGE OF CANADIAN CONSTANT SAMPLE GROUP OF (8) COMPANIES

	2009	2012	2013	Pctg. Change		4-yr Annualized Growth Rate
				1-yr	4-yr	
<b>PERSONNEL</b>						
Artistic	\$2,182,859	\$2,295,012	\$2,449,773	6.7%	12.2%	2.9%
Production and Technical	\$1,512,021	\$1,755,461	\$1,670,774	-4.8%	10.5%	2.5%
Singer Training	\$150,069	\$50,891	\$67,251	32.1%	-55.2%	-18.2%
Marketing/PR/Box Office	\$270,443	\$303,633	\$330,706	8.9%	22.3%	5.2%
Development	\$254,234	\$227,912	\$233,117	2.3%	-8.3%	-2.1%
Education	\$71,357	\$42,951	\$45,040	4.9%	-36.9%	-10.9%
General and Administrative	\$583,570	\$622,090	\$697,318	12.1%	19.5%	4.6%
<b>Total Personnel Expense</b>	<b>\$5,024,553</b>	<b>\$5,297,948</b>	<b>\$5,493,977</b>	<b>3.7%</b>	<b>9.3%</b>	<b>2.3%</b>
<b>NON-PERSONNEL</b>						
Production	\$1,272,990	\$1,174,817	\$1,319,338	12.3%	3.6%	0.9%
Singer Training	\$171	\$23,306	\$0	-100.0%	-100.0%	0.0%
Broadcasting, Recording and Internet Expense	\$51,955	\$48,446	\$36,566	-24.5%	-29.6%	-8.4%
Marketing/PR/Box Office	\$604,314	\$631,594	\$579,622	-8.2%	-4.1%	-1.0%
Development	\$302,725	\$441,536	\$451,106	2.2%	49.0%	10.5%
Education	\$58,478	\$55,218	\$60,402	9.4%	3.3%	0.8%
General and Administrative	\$523,140	\$787,546	\$1,250,273	58.8%	139.0%	24.3%
<b>Total Non-Personnel Expense</b>	<b>\$2,813,773</b>	<b>\$3,162,464</b>	<b>\$3,697,307</b>	<b>16.9%</b>	<b>31.4%</b>	<b>7.1%</b>
<b>Total Expense</b>	<b>\$7,838,326</b>	<b>\$8,460,412</b>	<b>\$9,191,284</b>	<b>8.6%</b>	<b>17.3%</b>	<b>4.1%</b>

### PERCENT OF TOTAL EXPENSES

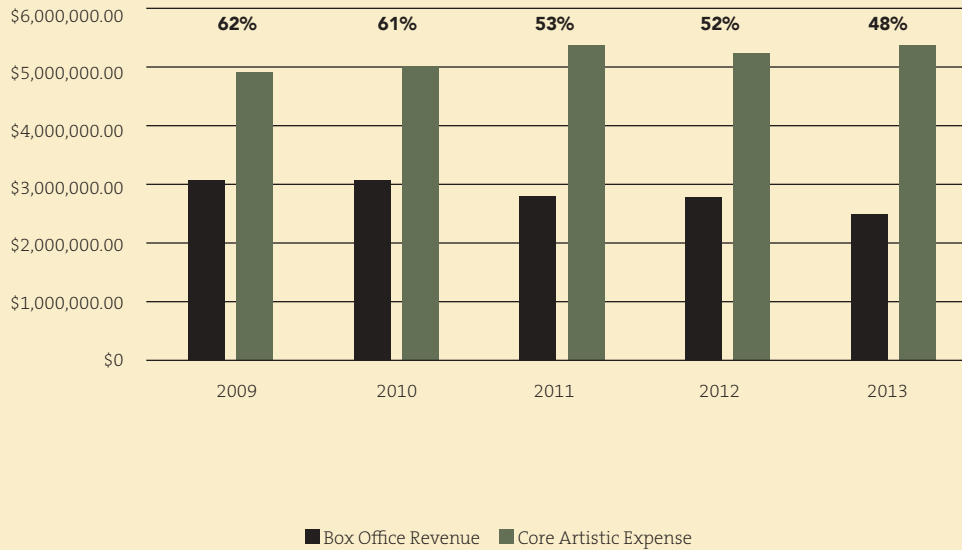


### 2013 EXPENSE BREAKDOWN

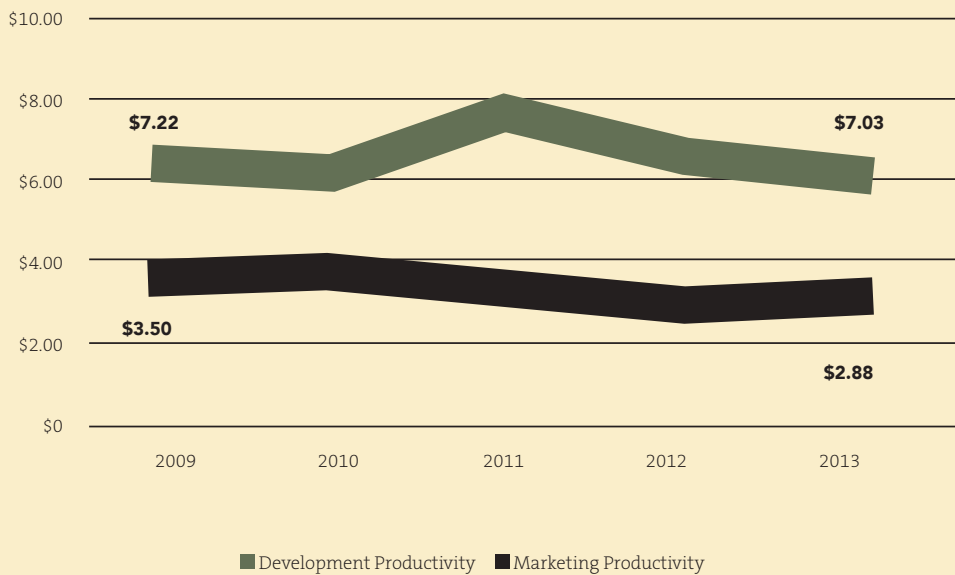


# CANADIAN PRODUCTIVITY

## PROGRAM COVERAGE — CANADA



## AVERAGE DEVELOPMENT AND MARKETING PRODUCTIVITY — CANADA



# SUPPORT FOR OPERA AMERICA

## NATIONAL OPERA CENTER LEADERSHIP GIFTS

### \$2 MILLION OR MORE

Pamela J. Hoiles  
The Andrew W. Mellon Foundation

### \$1 MILLION–\$2 MILLION

Horace H. Irvine II  
Anonymous

### \$250,000–\$1 MILLION

City of New York  
Baisley Powell Elebash Fund  
Barbara and Ronald Leirvik  
William C. and Susan F. Morris  
Anonymous

### \$100,000–\$249,000

Bloomberg Philanthropies  
Booth Ferris Foundation  
Elizabeth and Jean-Marie Eveillard  
James A. Feldman  
The Filstrup Foundation  
Jane A. Gross  
Cynthia Fry Gunn and  
John A. Gunn  
Henry Family Fund  
Jay Lesenger

Dr. Steve and Rochelle Prystowsky  
Marc and Cathy Solomon  
Jill and William Steinberg  
The Virginia B. Toulmin Foundation  
Anonymous

### \$25,000–\$99,999

Allen R. and Judy Brick Freedman  
Lloyd and Mary Ann Gerlach  
Sherrill Milnes and  
Maria Zouves Milnes  
Michael and Noémi Neidorff  
James and Deborah Reda  
Rita G. Rudel Foundation  
James R. Seitz, Jr.

### \$10,000–\$24,999

Jane Goddard Akin and  
Steven Paul Akin  
Gus and Mary Blanchard  
Luigi Caiola, Rose Caiola and  
Edward Mermelstein  
Patricia C. Compton  
The Robert and Mercedes  
Eichholz Foundation

Isabel and Algernon M. Ellien  
Foundation, Inc.  
Anthony Freud and Colin Ure  
Jane Hartley  
The Jeanette and H. Peter  
Kriendler Charitable Trust  
Lyric Opera of Chicago  
Charles MacKay  
Paul and Sandra Montrone  
Minnesota Opera  
Opera Theatre of Saint Louis  
Brig. Gen. (Ret) George B. Price  
and Dr. Laura G. Kafra-Price  
and Family  
San Diego Opera  
Board of Directors  
Marc A. Scorca  
Marilyn Shapiro  
Gregory C. Swinehart  
Thomas E. Terry

## OPERA AMERICA OPERATING SUPPORT

### CHAIRMAN'S CIRCLE

#### \$20,000 OR MORE

Berwind Fund\*  
Emilie Roy Corey  
Barbara Winter Glauber  
Barbara and Ronald Leirvik\*  
Mr. and Mrs. George L. Lindemann\*  
Susan F. and William C. Morris\*  
John G. Turner and Jerry G. Fischer

### \$10,000 OR MORE

Mr. and Mrs. John E. Baumgardner, Jr.  
Jane Bernstein and Bob Ellis\*  
James A. Feldman  
Allen R. and Judy Brick Freedman\*  
Ronnie and Sylvia Hartman  
Pamela J. Hoiles\*  
Horace H. Irvine II\*  
Jane and Morton Robinson\*  
Mr. William T. Weyerhaeuser,  
President, Sequoia Foundation  
and Mrs. Gail T. Weyerhaeuser,  
Trustee, Sequoia Foundation

### AMBASSADOR-AT-LARGE

#### \$5,000 OR MORE

Anonymous (3)  
Louise Gaylord\*  
Jane A. Gross  
Carol and Warner Henry\*  
Kenneth Kashkin  
Beth Madison  
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# RECITAL HALL TO BE NAMED FOR MARC A. SCORCA

To honor President/CEO Marc A. Scorca on the 25<sup>th</sup> anniversary of his leadership of OPERA America, board members, colleagues and friends in the opera field have joined together to conduct a campaign for the National Opera Center and name its Audition Recital Hall in his honor. The dedication of the Marc A. Scorca Hall will be held at the Opera Center on Saturday, February 28, 2015.

The Board of OPERA America deeply appreciates the generosity of the following individuals and welcomes additional contributions to the campaign.



Photo: The ribbon-cutting ceremony at the opening of the National Opera Center in 2012, with (l-r) Charles MacKay, general director of The Santa Fe Opera; Frayda B. Lindemann, chairman of OPERA America; and Marc A. Scorca, president/CEO of OPERA America.

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# New Operas from SCHOTT | EAM

## Bernard Rands **Vincent**

Indiana University, Jacobs School of Music | April 8, 2011

Described as “tremendous” and a work of “aural magic” (*American Record Guide*), Rands’s *Vincent* depicts the life of van Gogh and the painter’s complicated relationship to his art. *Vincent* is a “powerfully affecting opera” (*The Huffington Post*) featuring a libretto by J.D. McClatchy.



photo: Van Gogh Museum



photo: Philip Greshong/Cincinnati Opera

## Gregory Spears **Fellow Travelers**

In development – OPERA America New Works Forum | January, 2015  
Produced for New Works Forum by Opera Fusion: New Works  
Co-commissioned and executive produced by G. Sterling Zinsmeyer

Based on the novel by Thomas Mallon, *Fellow Travelers* is a journey through the world of the 1950’s American witchhunts, revealing an intimate, personal story set against the public, political backdrop of the “Lavender Scare.”

## Tobias Picker **Dolores Claiborne**

San Francisco Opera | September 18, 2013

Commissioned by San Francisco Opera, Tobias Picker’s thrilling setting of Stephen King’s best-selling novel, *Dolores Claiborne* has been called “a triumph,” “a brilliant musical incarnation,” and “a momentous addition to the expanding canon of American opera.”



photo: Cory Weaver



photo: Michael Daniel

## Douglas J. Cuomo **Doubt**

Minnesota Opera | January 26, 2013

Called “a philosophical yet lyrical whodunit” and a work “that speaks to the heart,” *Doubt* features a libretto by John Patrick Shanley and is based on Shanley’s Pulitzer Prize and Tony Award-winning play.

## Julian Anderson **Thebans**

English National Opera | May 3, 2014

*The New York Times* calls Anderson’s treatment of the Greek trilogy “distinctively impressive” and “an opera like no other... arguably the most spectacular orchestral writing heard in any opera of the past half a century. For mastery of texture, color and invention, Mr. Anderson sets standards.”



photo: Tristram Kenton

Also recently premiered:

**George Benjamin, *Written on Skin***

Festival d’Aix-en-Provence, July 2012

**Luke Bedford, *Through His Teeth***

Chroma Ensemble, April 2014

**Richard Ayres, *Peter Pan***

Staatsoper Stuttgart, December 2013

**Gerald Barry, *The Importance of Being Earnest***

Los Angeles Philharmonic, April 2011 (concert) | Opéra National de Lorraine, March 2013 (staged)



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