

ACROSS THE BOARD

A Publication of OPERA America for Opera Company Trustees



From the President and CEO

Across the Board debuted four years ago. You surely share my relief that our field is beginning to return to some semblance of those pre-pandemic years — yet now with the opportunity to achieve something new.

Our annual conference, in Minneapolis and online, invites you to reconsider your company missions and how you serve your communities. The featured interview in this issue offers guidance on how to think about the strategic planning that will underscore this important work.

The future of our field relies on you — on engaged board members who can leverage the resources of OPERA America to steward your companies. It's why we've been challenged with a gift of \$50,000 to recruit or re-enroll at least 100 opera company trustees into our membership before June 30.

If you're not yet a member of OPERA America, I hope you will join — for just \$75. You can benefit from everything OPERA America offers while helping to unlock this generous gift in support of our service to the entire field.

MARC A. SCORCA
OPERA AMERICA

A Strategy for Creating Value

The life cycles of companies renew over time with appointments of new general directors, moves to secondary venues, and responses to consequential events. Right now, every opera company in North America is facing the beginning of a new, post-COVID life cycle — and planning has never been more important.

Marc A. Scorca, president and CEO of OPERA America, called on Ryan A. Krause, Fort Worth Opera's board chair and professor of strategy at Texas Christian University's Neeley School of Business, to talk about how opera board members should be thinking about planning at their companies.

MARC A. SCORCA: I want to start by asking where Fort Worth Opera was in its life cycle at the onset of the pandemic. I believe you had only just joined the board and the company was in the midst of a leadership transition. Where were you in your planning?

RYAN KRAUSE: I joined the board at the end of January 2020, and there was a lot going on. We had just begun a search for a new general director. We were planning our spring festival for 2020. And we were discussing whether we should change from the festival format to a season-long format. Then COVID hit. We had to cancel the whole season, and we postponed the general director search while we were figuring out what was going on.

MARC: Did COVID give you an opportunity to think differently about planning?

RYAN: We resumed our search in the summer and were very fortunate to hire Afton Battle, who started in September 2020. The pandemic gave us an opportunity — not to start a strategic planning process, because we were still in crisis mode — but to shift our programming, to do whatever we could think of to get out there and be in front of people.

MARC: So when did you decide it was time to start thinking about a new strategic plan?

RYAN: We wanted things to normalize a bit. When I became chair last September, one of the initiatives I wanted to do was to put together a strategy working



group. I should say, I'm not a big fan of what you might call "strategic planning." I think "planning" is really important for operational things, for budgeting reasons, for having an expectation about what's coming and where you're going to be. But for me "strategy" is more of an idea; it's a theory about how you're going to create value in the community.

MARC: I'm fascinated by your language. In the old days, strategic plans used to say, "We're going to do three operas next year, then four operas a year after, and five operas a year after that. And we're going to grow from X subscribers to Y subscribers, etc., etc." Strategic plans were very operational with all sorts of numeric benchmarks.

RYAN: Exactly. But in today's environment, with the uncertainty of COVID, benchmarks are just numbers on paper that you end up revising over and over. Instead, we've begun a "strategizing process" — to put together a document that sums up who we are as a company and how we create value in Fort Worth.

MARC: Are we talking about the difference between an operating plan and a strategic plan? What are the nuances of each as you see them?

RYAN: The way I think about it is your mission, vision, and values are who you are. Your *continued >*

strategy should be your why and how; and your planning should be your what and where.

There's nothing wrong with laying out objectives — e.g., “We want to grow patrons by X percentage next year.” — but how are you going to do it? Not just in terms of actions (e.g., putting more ads on social media) but in terms of the why: Why are people who have resources going to transfer those resources to your company?

MARC: What does this mean for your strategizing process at FWO?

RYAN: As a business professor, I like to think about everything in terms of value creation. So the first thing to figure out is who are you creating value for? In our strategizing process at FWO, we identified who our key groups are. Who are we trying to create value for? When you create value for people, they give you their money because they value what you do more than they value their money.

The hardest thing with the strategizing process is getting people to think abstractly. When you talk about how we are differentiating our company from other performing arts companies, we need to think in abstract terms. It's not just, we do opera and they don't. You have to think more broadly. One of the things we did this year was bring some people onto our FWO board who weren't particularly interested in opera. They're interested in serving the community. That creates a very

different atmosphere where you get less of the “I want us to do Verdi rather than Mozart” mentality and more of the “what are we doing for this group of people?”

MARC: I think it's wonderful that you're stepping back and thinking at that abstract level. But Fort Worth Opera is an opera company at the end of the day. How do you decide what you will do and what you won't?

RYAN: I like to talk about tradeoffs: What are you going to say “no” to in order to stick to the way you create value? There's a lot of tempting things out there that people want to do. And in the nonprofit space, especially, you get driven a lot by what people want to do, instead of necessarily what makes the most sense in the strategy.

We start from the choice we've made about how we create value. Maybe we can't do X, Y, and Z that this board member wants to do, or that this donor wants to do, because it's just not consistent with how we create value.

I don't think a lot of companies think about “why us?": Why would people spend their hard-earned time and money with us — as opposed to the symphony, as opposed to the ballet, as opposed to Netflix? The answer should be unique for whomever you've decided to serve.

MARC: Is answering the question of “why us?” the end-all of your



strategy working group? Or, once you figure that out, do you go another step in your strategizing process?

RYAN: That question is central to the process; it's one you should spend a lot of time on.

We are dividing our plan into three components: diagnosis, guiding policy, and a coherent set of actions. Diagnosis is the analysis: What are our strengths? What are our weaknesses? What is the problem or challenge? You might use surveys or focus groups to build this out.

The guiding policy is our lodestone: how we create value. What key tradeoffs are we going to make? How are we differentiating ourselves in the marketplace? For us, it's what makes us stand out and how we

create value in the Dallas-Fort Worth arts scene.

Once you've finalized your policy, you move on to a set of coherent actions. We've broken this part of the plan down into the main areas of work that the company does: artistic, marketing, development, etc. What does our guiding policy mean for each of these areas? Here is where we drill down into the specifics and where the staff gets involved. This is where you set your priorities for how you deliver the value you've set out to do. ■

Adapted from the session “Strategic Planning Through COVID-19” at the 2022 virtual National Trustee Forum on February 25, 2022.

Join us for Opera Conference Online!

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- What is the mission of an opera company today?
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OA Trustee Resources

Trustee Resource Page

For a listing of the resources available to you as a company trustee, visit operaamerica.org/Trustees or download the 2022 Trustee Quick Guide at operaamerica.org/TrusteeQuickGuide.

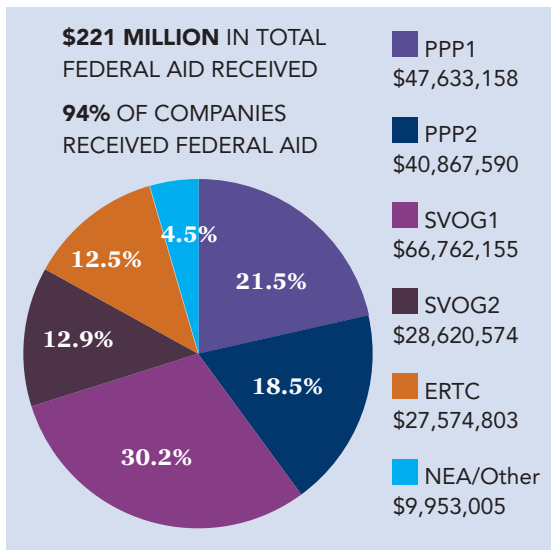
Company Workshops

OPERA America's Marc A. Scorca is available to lead virtual and in-person workshops on topics including governance, civic practice, and financial health. Consult your general director and call **212.796.8623** for details.

Advocacy for Federal Relief

Advocacy efforts by opera administrators, trustees, OPERA America, and its nonprofit partners demonstrated their power over the past two years: The opera industry received more than \$221 million in federal aid during the pandemic, according to a fall 2021 survey of OPERA America's Professional Company Members.

Since March 2020, the U.S. Congress enacted several major pieces of legislation totaling well over \$6 trillion in pandemic aid, including support of the arts and cultural sector at the state and local levels. Four main relief programs — Paycheck Protection Program (PPP), Shuttered Venue Operators Grants (SVOG), Employee Retention Tax Credits (ERTC), and special support from the National Endowment for the Arts and regional arts agencies — buoyed opera companies until they could begin performing for their communities again. ■



Come Home: A Celebration of Return

BY ERIC JON LARSEN, BOARD CHAIR, WASHINGTON NATIONAL OPERA

On the occasion of Washington National Opera's return to the Kennedy Center on November 6, 2022



“Come back in time with me to March 7, 2020, and the opening night of WNO’s Samson et Dalilah. What a triumph it was! Remember how confident in the future we were? But since that warm, spring Saturday evening, we endured 610 days of silence and darkness. And for our artists, musicians, and staff, it was 610 days of uncertainty, sacrifice, and at times, hopelessness.

“Yet in these moments of introspection and fear, art emerges more urgently than ever. In the hierarchy of human values, creativity — along with worship, play, and love — is the quintessential expression of what it means to be human. To be fully alive, we need to express ourselves. To be fully alive, we need to experience sublimity in the company of others. To be fully alive, we need the arts.

“Like the human spirit, opera has proven itself to be resilient and indomitable. We have adapted, evolved, innovated — from opera trucks to digital performances. Opera is transforming, becoming ever more accessible, diverse, and welcoming to all. For an ancient, 400-year-old art form, we are looking pretty youthful and spry. So here we are, joyously emerging from hibernation, the stage lit, the voices luminous: a most magnificent homecoming.” ■

Opera America Magazine

OPERA America's quarterly magazine addresses the issues most important to industry professionals, from marketing strategies and governance practices to exciting new repertoire.

IN THE SPRING 2022 EDITION:

- Reimagining Inherited Repertoire
- Women Composers on the Podium
- Models for Equity in Minneapolis
- Music Schools in the Pandemic
- Tribute to Stephen Sondheim
- “My First Opera” with Denyce Graves

You can subscribe to *Opera America Magazine* by joining OPERA America as a trustee member for \$75 at operaamerica.org/Join.



NATIONAL TRUSTEE WEEKEND

NEW YORK, NY | OCTOBER 19-22, 2022

OPERA AMERICA

MOVING OPERA FORWARD

NATIONAL OPERA CENTER
330 SEVENTH AVENUE
NEW YORK, NY 10001

OPERA America is the national advocate for opera, dedicated to supporting the creation, presentation, and enjoyment of the art form for artists, administrators, trustees, and audiences since 1970.



NATIONAL TRUSTEE
FORUM



OPERA AMERICA SALUTES
AWARDS DINNER



OUTINGS AND
PERFORMANCES

OPERA America invites trustees from across the country to New York City for five days of seminars, performances, and celebration — including the induction of the Opera Hall of Fame and bestowal of the National Opera Trustee Recognition Awards.

LEARN MORE & REGISTER [OPERAAMERICA.ORG/NTW](https://operaamerica.org/NTW)

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Spring/Summer 2022 Issue

Letter from the President/CEO

Strategic Planning for Boards

Advocating for Federal Relief

A Celebration of Return

Future Trustee Meetings

[OPERA CONFERENCE 2022](#) | June 27-28, 2022 | Online

[ESSENTIALS OF OPERA GOVERNANCE](#) | Fall 2022 | Online

[NATIONAL TRUSTEE FORUM 2022](#) | October 19-21, 2022 | New York City

[OPERA CONFERENCE 2023](#) | May 2023 | Pittsburgh

OPERA CONFERENCE

Online | **2022**
June 27-28

[OPERAAMERICA.ORG/CONFERENCE](https://operaamerica.org/conference)