

**State of the Symphony Annual Report
Santa Rosa Symphony 2020-2021
Submitted to the SRS Board of Directors
by President & CEO Alan Silow
June 22, 2021**

Executive Summary: “A Miracle Season”



Stage rehearsal for concert recording session, socially distant, masked, plexi-glass separators

This has been a fiscal year like no other in our 93 year history. The mid-March 2020 onset impact of the COVID-19 pandemic tested our ingenuity and commitment to artistic and educational vibrancy, diversity and relevancy within a fiscally sound environment. In the end, we passed the test with flying colors.

Top Organizational Highlights this year included:

- Secured numerous governmental and university approvals and established new safety and health protocols to record and stream more orchestral performances than any other California orchestra
- Developed totally new approach for first time streaming a full season for free that led to more online viewership than if had sold out 3 concerts at Green Music Center
- Music director reprogrammed entire classical season with creative, new, components, to suit online virtual presentations and satisfy union regulations, met with great acclaim
- Virtual concerts largely responsible for 121% rise in individual donors, 289% rise in new donors and 167% rise in donations, from 22 different states
- Unequalled support for musicians a constant thread throughout the season
- Most successful gala fundraiser in our 18 year history honoring Corrick & Norma Brown
- Negotiated 3 local PBS TV broadcasts to 2.8 million households first time in our history
- Dynamic, creative and effective community engagement by staff while sheltered-in-place
- All education programs proceeded, creatively retrofitted for online and in-person
- Record level of donations buoyed by high levels of individual donations, board giving, government grants and League support
- Despite a fiscal year of unanticipated organizational turmoil, this will be the eighteenth consecutive year ending the fiscal year in the black

Traumatic Times Call for Inspirational Responses

9/11. The Great Recession. The Tubbs and Kincadee wildfires. Drought-forced power outages. And then COVID.

The pandemic's immediate impact has been overwhelmingly painful, if not deadly, for this planet, for our country and for so many of our businesses and citizenry.

Yet, the Santa Rosa Symphony has continually faced these traumatic interruptions by valuing its role in making a difference in the life of its community. The success of our organization has been based on artistic and educational excellence, fiscal ingenuity and community engagement. Intangible assets like trust, good decision-making, artistic and managerial expertise, reputation and relationships, a positive organizational culture, and the quality of the board, staff and orchestra all have influenced our performance.

Moreover, our accomplishments have reflected a balance of steadfastness in mission and vision alignment with the capacity to adapt as needed. That adaptive capability was tested, as never before, with the unparalleled impact of the COVID-19 pandemic that forced many orchestras to go dark. So to 'plan and adjust' has been our mantra. It required a learning orientation where we were not only willing to modify programming and operations, but also offered us the opportunity to reimagine our model of how we engage and interact with our stakeholders. And it required administrative staff to continue working remotely, sheltered in place, where only now, 15 months later are we beginning to slowly gather back together in the office. Though definitely not seamless, the staff embraced a new, digital world filled and despite long work hours, operated with creativity and effectiveness.

A Virtual Reality Made Real

The COVID induced closure of live performances, led to a new big hairy audacious goal that no other California orchestra even attempted - the creation of 8 high quality, creative, virtual, orchestral size performances that would reach more people than we ever could in person and raise more money. Most said it was impossible (which typically proves it's a BHAG) – won't get govt. or university approval, too expensive, staff has no virtual skill set, no one will watch it online or donate, musicians won't play socially distant with masks, etc.

It required months of planning and detailed adjustments to fulfill the music director's creative inspiration for a virtual season. First required maneuvering through a complex, bureaucratic maze to obtain institutional approvals, including the State, County public health, musicians union, GMC, and SSU risk management. Keys to unlocking such approvals was moving from a concert centric focus to a private recording session focus, producing a substantial safety and health protocol and identifying supportive players along the way.

On top of it, due to the wild fires in Sonoma County and surroundings, we had to contend with rescheduling the first concert rehearsals and recordings several times. Just to remind you, all this happened while we were evacuated – what a tale of perseverance.

It was not always evident what decisions were the right ones to make in the face of so much unknown and uncertainty. Yet our mission-driven focus to support our stakeholders – subscribers, musicians, and the community of music lovers at large – led to a clarity of purpose and extraordinary effort that culminated in one of, if not the most, memorable season in our long history.

Once such approvals were in place, we moved to reimagining how we would present Francesco's new season program that would best suit the new online reality we faced. Learning on the go, key strategic decisions included:

- using the YouTube SRS channel streaming platform as most familiar to our patrons
- making it free to avoid the low cost Netflix type online competition and reaching out beyond our physical borders to new viewers and donors
- more than only a concert, inclusion of musician introductions & inspiring requests for donations
- hiring professional video production team familiar with GMC
- performing in our visually beautiful Weill Hall
- stringent limitations on staff/musician attendance
- created new access benefits only for subscribers, including 30 day access to online concerts and newly created soloist recital videos
- Storyboard staff team, organized by Ben Taylor, to fulfill video requirements and editing
- Francesco added live pre-concert talk and post Q&A with musicians along with his online/IT/social media skill set

A Virtual Success Like No Other

The pieces put in place for the 8 virtual classical concerts, surpassed any of our expectations. Average viewership (estimated 2/household) was 4,421 exceeding what a sold out Weill Hall attendance would be for three concerts. Subscription to SRS YouTube channel rose by 1,200%, boding well for future viewing. Donations, including new virtual sponsorships, averaged \$26,624, exceeding typical single ticket sales.

Individual donations for the season tell a surprising and upbeat story about how well our virtual performances were received -

1. Total number of Individual donors to FYE20 – 634 households
2. Total number of new Individual donors to FYE20– 199 households
3. Total amount donated from the FYE20 new donors - \$ 52,199

4. Total number of Individual donors to FYE21 - 1400 households
5. Total number of new Individual donors to FYE21– 775 households
6. Total amount donated from the FYE21 new donors - \$138,732

And to top it all off, the quality of our video productions convinced Northern California Public Media to broadcast the last three virtual concerts on local PBS television station reaching more than 2.8 million households in the nine county Bay Area – a first in our history!

Unequaled Support for our Musicians

COVID closed down unexpectedly, overnight, the numerous orchestras that employed our musicians, sometimes known as the ‘freeway philharmonic’. The loss of income was palpable.

This organization recognized the loss and responded better than most, if not all CA regional orchestras. We immediately pre-paid musicians hired for the 8 cancelled concerts in spring 2020 and a year later completely wrote that \$274,000 off of our books as rescheduled concerts were reconfigured or postponed even further.

Staff executed a rigorous safety and health protocol resulting in NO one testing positive all season.

Being self-funded, we paid a record level of unemployment claims at nearly \$100,000, 70% higher than that of FY20, even with federal govt. subsidies.

Continued to pay higher agreed upon CBA rates when many other orchestras sought to freeze or reduce rates. Contributed additional payments to musicians under the IMA for recordings and PBS broadcast. Paid musicians the highest service rate for CA regional orchestras, for more virtual concerts, engaging more musicians (on average 50), for more virtual concerts (8) than any other orchestra in California.

From Survive to Thrive

On the annual operating side, many of our budgeted assumptions for FY21 were clearly erroneous, not the least of which was a budgeted expectation of a year end deficit of -\$173,882. Remember that last June we all expected to be back in the hall with live performances in January 2021. But given the wholly unexpected impact of COVID-19 pandemic closing down all of the organization’s live performances and in person educational services for all of FY21, one might have expected an even worse fiscal outcome as earned revenues dropped precipitously. Yet that is not the case.

Our decisive move to a virtual gala and classical virtual concert season contributed to a record-breaking level of donations. Furthermore, A PPP loan from the federal government of \$480,167 was transferred into a grant through enormous effort by our Exchange Bank lender, Finance Director Kathleen Gebhardt and myself. These actions produced a wholly unexpected increase over budgeted revenues whereas given that many of our concerts were cancelled, expenses fell even further. The result, I am proud to say, more than ever before, is that we now expect to end this fiscal year with a substantial operating surplus, that will prepare us well for a somewhat continuing uncertain fiscal future.

Memorable Artistic FY20-21 Accomplishments

For the Santa Rosa Symphony Association's exceptionally challenged 93rd season, the ninth season as the Resident Orchestra of the Green Music Center as well as Maestro Francesco Lecce-Chong's third season as Music Director, the Santa Rosa Symphony miraculously produced eight virtual Classical Series programs in the GMC's Weill Hall during the midst of the ongoing COVID-19 pandemic. Given all of the challenges that the SRS was able to overcome, this remarkable achievement enabled the SRS to persevere, providing continued employment for its musicians and staff and widely acclaimed virtual programs for the patrons by means of innovative artistic programming and audio/visual production techniques.

It was necessary for the Family Concert Series to be cancelled, although Maestro Lecce-Chong produced a virtual program by leveraging excerpts of previously recorded repertoire from the Classical Series, scripted for a family audience that he hosted remotely from his home.

The Symphony Pops Series, co-produced with the Luther Burbank Center for the Arts, was also necessarily cancelled.

The SRS was meant to perform for the GMC's Fourth of July concert, and the SRS and GMC were intending to co-present the sixth annual free Community Concert as well as *Jurassic Park* In Concert at the GMC's Weill Hall + Lawn, but those summer productions were also cancelled.

Nevertheless, during the remarkable 2020-21 season, Maestro Lecce-Chong's visionary leadership brought a new dimension to the Association's ability to persevere and to do the impossible. The Symphony's already stellar reputation has undoubtedly grown due in part to the global reach of the virtual programs that had the passion and skill demonstrated by Maestro Lecce-Chong and the orchestra musicians. The respect that Maestro Lecce-Chong commands, both on and off the podium, is well-deserved.

In response to the ongoing COVID-19 pandemic, the SRS management, Musicians Union and Players Committee representatives met prior to the 2020-21 season and mutually negotiated a side letter agreement to the SRS Master Agreement that addressed articles and clauses pertaining to union dues, minimum service guarantee, attendance policy, auditions and conductor evaluations that would be suspended and held in abeyance during the 2020-21 season.

With that side letter agreement, SRS music director Francesco Lecce-Chong, was responsible for reprogramming the Classical Series repertoire for ensembles limited to thirty-two musicians on stage at one time. Standard rehearsal techniques and performance practices had to be modified, including each production having a condensed schedule with two rehearsals, a dress rehearsal and a recorded performance within two consecutive days.

In turn, all eight of the SRS@Home Virtual Concert Series programs were conducted by Maestro Lecce-Chong. Anchored by his imaginative, diverse and relevant programming, introducing new works by contemporary composers with classical repertoire by revered composers, each program was enthusiastically performed by the orchestra musicians and well-received by the patrons.

Seemingly insurmountable hurdles were overcome one by one, and precautions related to the COVID-19 pandemic were created and implemented to ensure that "the show must go on," e.g., the SRS developed backstage/onstage protocols for the musicians and staff at the Green Music Center that included temperature and wellness checks at the backstage entrance; the mandatory wearing of face-masks; social distancing with ingress/egress procedures and assigned warm-up spaces; staggered call-times/departure times; plexiglass screens on stage.

The SRS orchestra manager created stage plots for each of the selections on all eight programs that were integral to the coordination and efficiency of complex stage shifts by the stage crew, and which enabled the audio and video crews to position microphones and cameras correctly.

Each production included pre-concert talks and a post-concert Q&A hosted remotely by Maestro Lecce-Chong from his home. The pre-concert talks featured discussions with Maestro Lecce-Chong's artistic partner Ellen Taaffe Zwilich, and the post-concert Q&As included orchestra musicians recounting their musical challenges and experiences.

Maestro Lecce-Chong invited orchestra musicians to introduce selections on each program and patrons expressed their appreciation for the musicians' enthusiasm and perspectives about the repertoire. At first, the musicians recorded their introductions remotely from home; later during the season, a teleprompter was implemented for more consistent production value and quality. Maestro Lecce-Chong and composer Ellen Taaffe Zwilich remotely recorded introductions for her music together from their homes.

The SRS senior staff held pre-production meetings with Maestro Lecce-Chong to discuss program content and review storyboards in advance of production meetings with the stage, audio and video crews. Maestro Lecce-Chong had an audio assistant listening for mistakes to be fixed during patch sessions and a video assistant who called shots of the orchestra musicians to the camera operators. Following each recorded production, there was a one to two-week period for editing in advance of the delayed stream broadcasts on the SRS YouTube channel. Maestro Lecce-Chong was instrumental to the editing process providing advice and direction to the Diversified Stage video director. Also, Classical Sets 6, 7 and 8 recordings were reformatted for television broadcasts on local PBS channels KRCB and KPJK.

Following are program details about the 2020-21 Season SRS@Home Virtual Concert Series:

Classical Set 1 featured repertoire written for each section of the orchestra with Maestro Francesco Lecce-Chong conducting George Walker's *Lyric for Strings*, two *Canzoni for Brass* by Giovanni Gabrieli, arranged by SRS principal trombone Bruce Chrisp with the brass musicians positioned in the upstairs choral loft; Gabriella Lena Frank's *Escaramuza* for Strings, Percussion, Harp and Piano; the *Serenade for Thirteen Wind Instruments* by Richard Strauss; concluding with Ludwig van Beethoven's *Symphony No. 1*, the first of the three symphonies in a mini cycle commemorating Beethoven's 250th birthday.

Similar to the Kincaid Fire of 2019, the Classical Set 1 production was compromised by the Glass Fire in Sonoma County which, due to poor air quality, resulted in the closure of Sonoma State University including the Weill Hall of the Green Music Center. As each day went by, the Friday 10/02 and Saturday 10/03 rehearsals were cancelled, and unless rehearsals could occur on Sunday 10/04, the production was in jeopardy of being cancelled. Fortunately, by that Sunday, the air quality was satisfactory and the Green Music Center became available. The first two rehearsals were rescheduled that day with the dress rehearsal and recorded performance on the following Monday 10/05.

Classical Set 2 opened featuring another work by Gabriela Lena Frank, *Coquesteos*; the SRS associate concertmaster, Jay Zhong, and assistant principal second violin, Michelle Maruyama, were the featured violin soloists in Chen Yi's *Romance and Dance*; Maestro Lecce-Chong conducted Scott Joplin's *The Entertainer* and *Maple Leaf Rag*, arranged for small orchestra by Gunther Schuller; principal cellist Adelle-Akiko Kearns performed Max Bruch's *Canzone*; the program concluded with Ludwig van Beethoven's *Symphony No. 2*.

Classical Set 3 featured Maestro Lecce-Chong conducting Jessie Montgomery's *Source Code* for String Orchestra, followed by a Concerto Grosso by Antonio Vivaldi and Ludwig van Beethoven's *Symphony*

No. 3, *Eroica*. The program concluded with an encore for the holidays, *Fantasia on Greensleeves* by Ralph Vaughan Williams.

During the Classical Set 3 recording session, Paul Hindemith's *Trauermusik* for Viola and Strings, featuring SRS principal violist Elizabeth Prior, was also recorded for a separate guest artist recital series that was produced as an added benefit for donors and patrons.

Classical Set 4 was an orchestral program featuring Maestro Lecce-Chong conducting Johann Sebastian Bach's Ricercare from *The Musical Offering* arranged by Anton Webern. The first of five works by Maestro Lecce-Chong's 2020-21 season artistic partner Ellen Taaffe Zwilich, *Concerto Grosso 1985*, was then performed followed by Marianna Martines' *Sinfonia*. The program concluded with Wolfgang Amadeus Mozart's Symphony No. 39.

Classical Set 5 was another orchestral program featuring William Grant Still's *Serenade* followed by Richard Wagner's *Siegfried Idyll*, both composed for small orchestra. Maestro Lecce-Chong then conducted Ellen Taaffe Zwilich's *Prologue and Variations* for String Orchestra, and the program concluded with Antonín Dvořák's *Czech Suite*.

Classical Set 6 opened with another featured work by Jessie Montgomery, *Starburst* for String Orchestra, followed by *Adagio for Strings* by Samuel Barber. The program also was the first to feature a visiting guest artist, the acclaimed cellist Zuill Bailey, performing as soloist for Ellen Taaffe Zwilich's Cello Concerto. *The Unanswered Question* by Charles Ives was performed with woodwind musicians positioned in the choir loft and a trumpeter in the balcony. And the seldom-performed Serenade No. 2 by Johannes Brahms concluded the program.

Classical Set 7 featured Caroline Shaw's *Entr'acte* for String Orchestra. The SRS concertmaster, Joseph Edelberg, was the violin soloist for Ellen Taaffe Zwilich's Romance for Violin and Chamber Orchestra. The orchestra then performed Danzón No. 2 by Arturo Márquez and the program concluded with the Serenade for String Orchestra by Piotr Ilyich Tchaikovsky.

Classical Set 8, the season finale, featured Gioachino Rossini's Overture to *Il signor Bruschino* followed by Michael Daugherty's *Asclepius Fanfare* for Brass and Percussion. Ellen Taaffe Zwilich's *Peanuts Gallery* for Piano and Orchestra was performed by soloist Elizabeth Dorman. Santa Rosa-born composer Paul Dooley rearranged his work, *Sonoma Strong*, commissioned and premiered by the SRS in 2018, for chamber orchestra and the final piece of the season was Franz Joseph Haydn's Symphony No. 45, *Farewell*.

In addition to the SRS@Home Virtual Concert Series, the Santa Rosa Symphony presented the following programs and events during the 2020-21 season:

The season opened with a Virtual Gala honoring SRS Conductor Emeritus, Corrick Brown, and his wife Norma who has since passed away. The recital featured pianist Olga Kern who remotely recorded her performance from Europe.

The guest artists originally engaged to appear as soloists on the Classical Series remotely recorded recital programs as an added bonus for donors and patrons who had purchased season subscriptions:

- Classical Set 1 – Olga Kern, piano
- Classical Set 2 – Elina Vähälä, violin
- Classical Set 3 – Elizabeth Prior, viola & Kymry Esainko, piano
- Classical Set 4 – David Krakauer, clarinet

- Classical Set 5 – Michelle Cann, piano
- Classical Set 6 – Zuill Bailey, cello
- Classical Set 7 – Julian Rhee, violin

Cello soloist Zuill Bailey also presented a remote masterclass for members of the SRS Youth Orchestra.

Due to the COVID-19 pandemic, auditions for orchestra vacancies were postponed during the 2020-21 season. Auditions shall be scheduled during the 2021-22 season for the following orchestra vacancies:

- Principal Trumpet
- Principal Contrabass
- Section Second Violin (Seat 12)
- Section Viola (Seats 6, 7 and 8)
- Section Contrabass (Seat 4)

Santa Rosa Symphony Institute for Music Education

The Santa Rosa Symphony Institute for Music Education consists of 5 component programs:

- Training Young Musicians – 5 youth ensembles, summer music academy
- Music for our Schools-Free Concerts For Youth, It's Elementary, Primarily Classical
- Simply Strings
- Family oriented programs- family concert series, discovery dress rehearsals
- Adult Education - open dress rehearsals, pre-concert talks, radio broadcasts, master classes
- Online programs added in response to COVID-19 program cancellations

Fiscal Challenges in a COVID impacted season

As youth orchestra enrollment fell, and live performances were eliminated, fiscally speaking, FY 21 was challenging for our education programs. Earned education revenues came in at \$108,430, a substantial 26.5% under budget; however expenses fell comparatively the same by 26.1% to \$448,032. Yet donor interest and support for our education programs fell dramatically, with donations of \$658,460(included gala education appeal), a considerable decrease of 18.5% over FY20 during a largely online season.

Training Young Musicians Enrollment Falts

Training includes the four Youth Ensembles, the String Orchestra Workshop, and the Summer Music Academy.

Enrollment fell significantly in the three ensembles that met virtually: Debut began the season with 23 but ended with 16, due to Zoom fatigue. Aspirante began with 29 and ended with 28; Santa Rosa Symphony Youth Orchestra had 44. String Orchestra Workshop, which met in person, had 19 at the beginning, 16 at the end (goal was 36), while Young People's Chamber Orchestra, which also met in person, started with 16 and ended at 12, one below the budgeted enrollment goal. The budget for the season was \$91,875. Revenue was \$69,309.

The drop in enrollment and the lack of in-person training quickly led to postponement of the SRSYO tour to Spain from June 2021 to hopefully June 2022.

Summer Music Academy Perseveres in Person

Summer Music Academy took place in-person with strict – and successful – health and safety protocols. It was again held at Sonoma Academy. Revenue was slightly lower than budgeted (budgeted: \$36,300; actual: \$34,950).

We offered an in-person experience to 53 young musicians ages 6 and up. Classes included Violin, Viola, Cello and Guitar Workshops; Jazz Ensemble; Chamber Ensemble (strings and piano only); Conducting/Composition; Rhythm and Movement. We required enrollment for full-day (9 am-3 pm) for all three weeks. Daily noon concerts featured faculty and students. On the final day, all groups performed for each other, and on the following Saturday, the Performance Academy held an outdoor concert for masked parents listening at a distance from their tailgates or lawn chairs.

Health & Safety: COVID-19

Ensuring the safety of the musicians, faculty and staff was our top priority. We followed CDC and county guidelines to develop clear health and safety protocols to mitigate the spread of COVID-19 on campus. Sonoma Academy was also instrumental in helping us maintain a high level of safety in the community. Our protocols were sound and effective and our daily practices kept people safe.

Training Young Musicians Adapts and Adjusts

String Orchestra Workshop, our beginning level string program, met weekly at The Children's Museum of Sonoma County in an accessible outdoor space. When classes were cancelled in March 2020 due to COVID-19, the instructors provided online lessons for their young musicians. The final recital on the day before Mother's Day was enjoyed by Museum visitors as well as parents and friends.

Young People's Chamber Orchestra, the advanced level, conductor-less string ensemble, met in-person *indoors* at the Saturday Afternoon Club, following strict health and safety protocols, with 14 members on site and one joining remotely. The group completed a recording for a virtual concert featuring SRS Music Director Francesco Lecce-Chong as guest harpsichordist. The program highlighted music by composers of color, and women composers. It featured the introduction of the Redwood Violin by the group's co-concertmaster, Aeden Seaver, who performed *Concertina*, a composition written specifically for this event by Gwendolyn Przyjazna, a member of the ensemble. The Redwood Violin was created entirely from locally sourced materials by Santa Rosa violinmaker Andrew Carruthers who felt this was the perfect project to re-connect people throughout the community during the time of COVID lockdowns. He is donating the instrument to the Santa Rosa Symphony Youth Ensembles.

Santa Rosa Symphony Youth Orchestra met weekly on Zoom and offered a series of Virtual Concerts, including *At the Movies* in March and *Wanderlust* in May which are still available on YouTube. Featuring chamber music performed by several small and large ensembles, the preparation for the concerts gave its members valuable chamber music and recording experience. They were viewed by families from as far away as New Hampshire, Wisconsin and Mexico.

Debut Youth Orchestra and Aspirante Youth Orchestra met online every Saturday morning via Zoom. The groups presented a virtual concert in February. To close the season, AYO presented a second virtual concert, and DYO members created a web art gallery exhibition where they share original compositions and art. These events are also still available on the SRS Education YouTube Channel.

Music For Our Schools Grows Online

It's Elementary continued to provide a 2-year-long suite of music education opportunities and services to six Sonoma County elementary schools, reaching over 2,600 students in Santa Rosa, Two Rock and Petaluma. The program offered teacher enrichment workshops on integrating music into their classrooms. In the fourth and final year of Primarily Classical, we offered virtual assemblies with professional ensembles of SRS musicians. The Free Concerts For Youth continued via Zoom webinar using a combination of recorded of instrument demonstrations and ensemble performances from the youth ensembles. These concerts enjoyed record attendance, as teachers "brought" their classrooms to the virtual site, with no bussing expense. Instead of traveling to their (closed) schools, our youth ensembles also provided virtual assemblies to elementary schoolchildren.

The Elementary School Listening Program provided daily listening to all subscribed schools. The program included more integrative arts content to assist teachers with remote learning. The scripts for the daily listening were translated into Spanish.

To prepare students for the IGNITE portion of the April Free Concerts For Youth, video-taped recorder lessons and accompanying IGNITE guide were offered to schools cost free. In addition to being offered to all It's Elementary partner schools, this program was made available to all fourth graders in the Santa Rosa City Schools.

Simply Strings Reconfigured

With Sheppard Elementary School closed, Simply Strings could not advance until the spring and was replaced by a project called Simply Strings Integrated Roseland Program, we offered weekly virtual music appreciation lessons during the school day. Three of our most experienced Simply Strings faculty created exciting content for all third graders in the Roseland School District – nine classrooms in all. In addition to learning about music in general, the children received materials to make paper violin and keyboards.

Simply Strings met in person March 29-May 21. In partnership with Land Paths, students who have been in the program in the past met twice weekly from 3:00-5:15 pm for instrument instruction, theory and rhythm. The setting, the community garden at Bayer Farm, was conducive to relaxed learning and creativity. The final concert on May 21 was attended not only by proud family and friends, but also members of the community and folks who just happened to be in the garden that day. Being more visible in the community has allowed us to make valuable connections with the neighborhood community, an essential component of any *El Sistema* program.

Events, Masterclasses and Workshops

Zuill Bailey, guest cellist with Santa Rosa Symphony, gave a virtual masterclass with performances by two cellists from the Santa Rosa Symphony Youth Orchestra and the Young People's Chamber Orchestra: 14 year old Tomas Mazeika, who played Faure's *Elegy*, and 17 year old Gwendolyn Przyjazna who played the first movement of the Cello Concerto, Op. 85, by Edward Elgar. The live Zoom event was attended by over 60 people and was later posted on the SRS Education YouTube channel.

Renewable Energy –Market Turnaround Fuels Record Endowment Growth

Our endowment fund was fully invested and continued to be overseen by TWP Wealth Management based in San Francisco. Their recommendations were buoyed by one of the sharpest turnarounds in stock market history. It contributed to a record endowment high of \$17,312,866 with an impressive 23.22% exceeding the benchmark of 22.63%. Keep in mind that the returns below include not only return on market results but also take into account management fees, unrestricted estate gifts and endowment draws.

Actual FY21 to date (May 31): +\$3,479,691

FY20: -\$770,404 (as of 5/31/20)

During my nineteen seasons here, we have never taken the full 5% draw allowed under SRS policy. We've drawn from the endowment on a quarterly basis as needed to support operations. Unlike previous fiscal years when we generally took 2-3 of the 4 allowable quarter draws, we took only the first quarter given the extraordinary rise in the stock market(plus the required distribution from two restricted funds).

As of May 31, 2021, overall, our balance sheet (unaudited) assets have grown an impressive 17.0% in one year to \$23,215,457 from \$19,844,888. Efficient financial administration by the Director of Finance & Administration Kathleen Gebhardt and solid financial controls in place was verified by our accounting firm – Dillwood, Burkel & Millar – with a clean FY 20 audit evaluation.

Development Summary: Record-setting Contributions in the Most Uncertain of Times

During a COVID pandemic year no less, the Santa Rosa Symphony set an astounding new record in donations with \$2.87 million contributed to the annual fund. This is a testament to a resourceful CEO and Development and Finance staff, deeply cultivated relationships, Board dedication, a mission and impact of true community significance, and so much more. This redoubtable achievement also owes to unique factors resulting from the pandemic.

1. Individual donors are a core of our contributed revenue, and our programming adjustments allowed us to maximize upon and expand this area.
2. While many businesses had major economic woes, our corporate revenues have typically been no more than 12% of our contributed revenues.
3. Unforeseen increases in government funding ballooned this category, which is typically no more than 7% in our funding profile.

Above all, flexibility from all—from staff and musicians to donors and funders—has made this possible. The year included several new records, as we exceeded budget goals in nearly all categories and skillfully executed campaigns that inspired confidence in the Symphony's service to our community.

Celebration 2020

Our annual gala was an early beacon of for our ultimate success. Bravely treading into a virtual, online paradigm, those faithful steps led to remarkable success. Capitalizing on the long held relationships and deep engagement with our own Symphony royalty, the gala honored the enormous contributions of Corrick and Norma Brown to our organization and its ability to impact the greater community. Financial success was due, ironically, to the virtual format with such deep community love for the Browns and the virtual format's low costs, the event had the largest net revenue on record.

FY21 Actual: \$378,363 with a net of \$364,963

FY20 Budget: \$346,150

Individual Giving Sets a Record

Thanks to a few key factors, we have achieved a new record, with individual support reaching over the million-dollar mark. This remarkable result relied on our many devoted donors continuing to give despite the circumstances. On top of this, the free virtual online concerts resulted in over \$100,000 in donations, including a staggering increase of 289% in new donors compared to the previous year. Finally, two “angel” donors’ combined contributions of \$150,000 in new support helped bring this year’s individual donations to new heights.

FY21 Actual to date (June 3): \$1,118,775

FY21 Budget: \$953,450

Board Giving Leads the Way

In the face of adversity, the Board of Directors showed its resolve in so many ways, adjusting with every new challenge. In no small measure, their determination showed in the unflagging donation support. In circumstances where one might reasonably expect board giving to significantly retract, the board’s generosity has sustained a level above the half-million dollar mark, continues to account for some of this year’s largest gifts, and showed the board’s clarity of its core mission. Moreover, the rollover of FY20 concerts to FY21, by rolling over \$28,666 in board donations, brought total FY21 board support to a record level.

FY21 Actual to date (June 3): \$588,469

FY21 Budget: \$570,400

Foundation Grants a Consistent Element of Success

Foundation grants this year maintained a strong position relative to our history, marking the second highest level in the last five turbulent years. Significant grants from the Hewlett Foundation, Sonoma County Vintners Foundation, Miranda Lux Foundation, the Kimball Foundation, and a final grant from the Finley Foundation helped us surpass our budget goal and maintain this critical aspect of our contributed revenues.

FY21 Actual to date (June 3): \$293,600

FY21 Budget: \$293,000

Corporate Partners Step Back

As expected, with many businesses under tremendous strain from the pandemic’s economic stressors, corporate support contracted this year, showing a decline of 14% from the previous year and marking the second lowest level in the past seven years. Many of our corporate partners remained supportive, but a number of gift sizes decreased and some went unrenewed.

FY21 Actual to date (June 3): \$164,523

FY21 Budget: \$179,538

Government Support Makes Incredible Strides

The previous three years—FY18 through FY20—were previously banner years for government support, variably showing a 36-100% increase over the previous high-water mark. But this year has been an extraordinary outlier in our history of government grants and overshadows these previous, laudable gains. This year, in addition to our typical mix of grants from the county, state and the NEA agencies, the CEO and Finance Director successfully navigated the labyrinth of the pandemic response by the federal government and realized additional grants and forgiven loans that brought our total government revenues to a historic 363% over the previous year.

FY21 Actual to date (June 3): \$569,666

FY21 Budget: \$118,000

The League Remains Steadfast

Just as this devoted group have long brought food to support our musicians during rehearsals, the League has continued to nourish the mission and the impact of this organization. Even in trying times, the League has been there all along, and this challenging year saw their support stay the course, sustaining a similar level to the previous year, for which we are deeply grateful.

FY21 Actual to date (June 3): \$35,950

FY21 Budget: \$35,500

Marketing Summary

A Performance Season lost to COVID Pandemic

Prior to the pandemic, we had announced an expanded FY20-21 performance season of 32 concerts with an additional 8 concerts rescheduled that had to be cancelled in spring of 2020. The COVID pandemic eliminated all of our live performances from going forward. A startling reality for all orchestras nationwide. In our case, it meant postponement to future seasons of our three GMC summer performances, Pops Series, Family Concert Series, Opera in Concert, and our May 2020 classical set. It also meant cancellation of our growing group sales efforts and new subscriber acquisition campaign. Yet, the Classical Series took a dramatic and powerfully creative turn.

Classical Series Reimagined to an Unprecedented Virtual Reality

The pandemic-caused cancellation of concerts beginning in March 2020 stopped what had been an annual increase in classical series revenues and sold occupancy rate since FY17 as well as our being on track to set a record for single ticket revenues in FY20.

Total Classical Series Revenues: FY17 \$1,058,912

Total Classical Series Revenues: FY18 \$1,068,046, increase of 0.86%

Total Classical Series Revenues: FY19 \$1,112,854, increase of 4.2%

Total Classical Series Revenues before Pandemic FY20: \$1,124,300, increase of 1.0%

Average Sold Occupancy for 2016-2017: 64.6%

Average Sold Occupancy for 2017-2018: 65.8%

Average Sold Occupancy for 2018-2019: 72.3%

Average Sold Occupancy for 2019-2020 before Pandemic: 72.24%

Average Sold Occupancy for 2019-2020 of Sets 1-5: 78.67%

However, given we had initiated our subscription renewal campaign in early March just prior to the COVID shutdown, we received \$659,091 for 1,888 FY21 subscriptions, though far lower by 26.8% at \$901,012 and 33% at 2,818 respectively than for the prior fiscal year due to no acquisition campaign for new subscribers. Yet the strategic decision was made to create a new virtual performance season with new access benefits (previously described) to serve those who had subscribed.

The subscriber response was overwhelmingly positive with only a 3.3% drop in requested refunds and a 4.8% change to donations by fiscal year end to \$600,722. In fact, total classical series ticket revenues were even higher with the decision to reimagine and reschedule the FY20 March classical set with an added eighth virtual concert in April 2021, thereby adding those revenues.

Social Media Continues to Reach Larger Audiences

For the third season in a row, our social media presence again saw strong increases due to our continued contract with Potluck Consulting.

Total Facebook likes by the end of May 2021 were 3,630 — a 36.77% increase from last May. Facebook average monthly page impressions, including all paid ad impressions, was up from an average of 69,578 impressions from August through May last season to 81,772 impressions from August through May this season—a 17.52% increase.

Instagram followers were up by 163 (13.74% increase) since last May, and total monthly Instagram post reach for the August through May season was up from a monthly average of 7,684 last season to an average of 14,591 this season—an 89.88% increase.

Twitter, which has historically been a slow-growing platform increased in followers from last May by 27—a 3.44% increase - despite a three-month cutback on Twitter efforts. Total Twitter tweet impressions for the August to May season averaged 7,821 a month last season and had an average of 3,422 this season—a 56.24% decrease.

Web traffic from social media sources has decreased from averaging 226 sessions a month last season to 174 a month this season—a 23% decrease. This drop was due to the majority of our web traffic producing efforts from social sources focused on driving traffic to the YouTube channel and not to the SRS website.

A Fond Farewell

Farewell to a season that will be long remembered, if not cherished, for the fortitude, creativity and perseverance that benefited our patrons, youth, musicians, staff, and community in so many ways.



Looking Ahead

The future looks cautiously optimistic as vaccination expansion and effectiveness point to fully reopening with live audiences in the Fall. But make no mistake, there is no return to a pre-pandemic ‘normal’. In the face of ongoing uncertainty, future changes will likely ask more of us and offer more to us. Asking us to be more transparent, compassionate and vulnerable than ever before, as we apply what we’ve learnt and test new alternative scenarios.

Though the path to such change may be murky, let us never forget the one thing that is absolutely clear – our music has been and always will be an essential antidote to the trauma of our times.

**“The greatest
healing will take
place when live
music comes back.”**



Back together again,

Handwritten signature of Alan Silow.

Alan Silow
President and CEO