

A | C | S | O

ASSOCIATION OF CALIFORNIA
SYMPHONY ORCHESTRAS

2018 ANNUAL CONFERENCE

August 9–11, 2018 | Sheraton Grand Sacramento



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HOSTED BY THE



Photo courtesy of the Sacramento Philharmonic & Opera

WELCOME



Darrell Steinberg
Mayor
City of Sacramento

As Mayor of the City of Sacramento, it is my pleasure to welcome you to the Association of California Symphony Orchestras' (ACSO) 2018 Annual Conference, and I am delighted that this event is being held in the State Capital.

Arts and culture play a significant role in fueling growth and economic development, as local artists are a vital component of Sacramento's cultural fabric. Sacramento is pleased to be the location in which ACSO conference delegates can discuss critical issues facing orchestras and the arts.

While you are here, I hope you have an opportunity to enjoy the many attractions our city has to offer. Sacramento, one of the oldest historic cities in California, is home to the State Capitol, Sutter's Fort, the Sacramento Kings, the Crocker Art Museum, the California Auto Museum, and of course, the Sacramento Philharmonic & Opera. You won't want to miss Old Sacramento, a unique, 28-acre National Historic Landmark and State Historic Park located along the beautiful Sacramento River, which has a variety of attractions including shopping, dining, entertainment, and world-renowned museums set in the time of the California Gold Rush and Transcontinental Railroad.

On behalf of the City of Sacramento, I thank ACSO for its commitment to providing essential leadership and resources to classical music advocates and organizations and extend my best wishes for a successful conference.

CONFERENCE INFORMATION

EXHIBITOR MARKETPLACE

Grab a cup of coffee and connect with businesses and individuals that serve the orchestra community. Learn more about their services and what they can do for you. A directory of exhibitors is included as an insert in this program.

Hours:

Thursday, August 9: 8:30 AM–5:00 PM
Friday, August 10: 8:30 AM–5:00 PM
Saturday, August 11: 8:30 AM–1:00 PM

Morning coffee service is available each day in the Exhibitor Marketplace from 8:30–10:30 AM.

TRACKS FOR EMERGING LEADERS AND BOARD MEMBERS

As two groups who are critical to the present and future health of orchestras, ACSO suggests two informal tracks of sessions and activities that are well-suited to each group's interests.

Emerging Leaders are identified as those who have worked in the orchestra field for five years or less. Look for sessions marked as **EL**.

Board members are individuals who are currently serving as trustees in the orchestra field. Look for sessions marked as **BD**.

SELFIE SPOT & SOCIAL NETWORKING

Make the ACSO conference even more memorable by taking a selfie at our designated Selfie Spot near the registration table. Gather a group of colleagues, use our props, strike a pose, and share your photo on social media using our special conference hashtag: **#ACSOcon**. ACSO Staff will pick their favorite photo

and the winner will receive a free three-day registration for the 2019 Annual Conference in Monterey.

   Don't forget to like and follow us on Facebook, Twitter, and Instagram.

SHOW YOUR BADGE FOR RESTAURANT AND TRANSPORTATION DISCOUNTS

Sacramento is America's "Farm-to-Fork Capital" and offers some of the freshest local produce you can find. Visit Sacramento has put together the Show Your Badge Program – a list of over 50 restaurants that offer discounts for convention delegates. All you have to do is show your conference name badge at participating restaurants to save money. Pick up a brochure at the registration table to get more information about the list of restaurants, transportation discount from Super Shuttle, and fun things to do around town. Or check out www.visitsacramento.com/acso for all the details.

TAKE A FREE TOUR OF THE STATE CAPITOL

Don't leave Sacramento without taking a tour of the State Capitol. Completed in 1874, it is an enduring and must-see attraction and a living museum dedicated to California's history. The Capitol is a



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ten-minute walk from the Sheraton Grand. Free public tours are conducted daily on the hour from 9 am to 4 pm. For tour information, contact the Tour Office at (916) 324-0333.

FUND-A-NEED: 50TH ANNIVERSARY INITIATIVE

ACSO is turning 50!

Celebrate this half-century milestone by supporting the crucial programs and services that benefit hundreds of classical music advocates and organizations in the West.



Donate to our 50th Anniversary Initiative. For every \$50 increment you donate to ACSO's Annual Fund, you will receive one entry into a drawing to win a complete conference package next year in Monterey (August 8–10, 2019), including a conference registration, an ocean-view stay at the Monterey Tides Hotel, and a travel voucher to get you there. The more you donate, the better your chance of winning! The winner will be announced at the Annual Meeting Breakfast on Saturday. You do not need to be present to win.

ACSO has received a corporate donation that can be matched dollar-for-dollar up to \$5,000, so any donation amount is welcome and appreciated to move us toward that fundraising goal. If you give during conference, you will receive a donor ribbon to proudly attach to your name badge as a symbol of your support!



Alan Mason
Board President

Welcome to the 2018 ACSO Annual Conference! This year marks the beginning of the fiftieth year of our vibrant state organization. We begin this milestone year in our state capital, reflecting on our important role as an advocate for musical arts in our state. We will then convene again in Monterey Bay next summer, returning to our birthplace as an organization where we were founded in 1969.

ACSO Executive Director Mitch Menchaca, Conference Chair Stephen Wilson, and Local Host Alice Sauro have planned an exciting program for us. We are very grateful to the Sacramento Philharmonic & Opera for its leadership in hosting this year's conference.

The ACSO community continues to project its voice on behalf of our members in 2018. We are on track to produce excellent collaboration at conference and beyond. We have developed new leaders, adopted a new strategic plan, and implemented new technology for interacting with members.

More importantly, we are transforming ourselves and our members. We have emerging leaders on our staff and board who have taken on expanded roles at ACSO and in their own organizations. We have stood together through challenging natural disasters and supported organizations renewing their artistic and administrative leadership. Together, we can inclusively meet the challenges of transforming ourselves, our organizations, and our state. Inclusion leads to better answers to the challenging questions we face.

During this conference, we ask you to connect with ACSO members who you do not yet know. Learn from each other. Share your passion for why we want classical music to thrive in the future. Lean in to discussions of how we can connect with the rich diversity of California's communities and share your voice about where change is needed. **Together**, we can lead the state toward creative and sustainable answers for the future of classical music!



Mitch Menchaca
Executive Director

It is an honor and pleasure to officially welcome you to the 2018 Annual Conference – the first of many events leading up to our 50th Anniversary celebration next year. Look for special programs and activities to take place over the next twelve months as we celebrate this milestone.

We applaud our members from across the state and region for the work you do in your communities, and we are especially grateful that you made the journey to Sacramento to help us kick-off ACSO's year-long anniversary celebration.

ACSO has been convening orchestra leaders for decades. Our conference is known for delivering relevant sessions and speakers. This year's meeting will be no different. You will find our agenda to be rich with insights from the best and brightest. This year's conference addresses some of our field's most current issues, including different viewpoints on audience development, emergency preparedness, and the role of the arts in policy, making Sacramento the perfect destination for this convening.

As you meet new and old friends over the next three days, I hope that the strategies and practices exchanged during the conference will serve you in the best possible way. I'm sure you'll find that the issues you face in your community are similar to issues that your peers are facing.

I want to thank the ACSO board, staff, and our local host, the Sacramento Philharmonic & Opera, for their work in making this year's conference rich with content. I would also like to thank our advertisers, exhibitors, and sponsors, especially Choice Entertainment Technology for their support as this year's lead conference sponsor.

Enjoy your stay in Sacramento, and I look forward to connecting with you throughout the conference!

SCHEDULE AT A GLANCE

	THURSDAY, AUGUST 9	FRIDAY, AUGUST 10	SATURDAY, AUGUST 11
8:00 AM			
9:00 AM	Registration & Exhibit Marketplace Open, 8:30 AM–5 PM, Glides Market		
10:00 AM		Conference Orientation 9–9:45 AM, Bondi Room	
11:00 AM	Opening Plenary & Musical Moment 10–11:30 AM Magnolia Ballroom	Morning Plenary: Arts and Policy 9–10:30 AM Magnolia Ballroom	Annual Meeting Breakfast & Musical Moment 9:30–10:30 AM Magnolia Ballroom
12:00 PM	Breakout Sessions 11:45 AM–1 PM Level 2	Breakout Sessions 10:45 AM–12 PM Level 2	Breakout Sessions 10:45 AM–12 PM Level 2
1:00 PM	Lunch on Your Own 1–2:15 PM	Afternoon Plenary, Musical Moment & Awards Luncheon 12:15–2:15 PM Magnolia Ballroom	Power Seminar: Audiences Everywhere with Matt Lehrman 12:30–3:30 PM Magnolia Ballroom
2:00 PM	Breakout Sessions 2:30–3:45 PM Level 2	Breakout Sessions 2:30–3:45 PM Level 2	
3:00 PM	Peer Forums 4–5:15 PM Various Locations	Peer Forums 4–5:15 PM Various Locations	
4:00 PM	Registration & Exhibit Marketplace Open, 8:30 AM–5 PM, Glides Market	Overture Party with the Sac Phil & Opera 5:30–6:30 PM, Community Center Theater Lobby	
5:00 PM	President's Reception 5:30–6:30 PM Tequila Museo Mayahuel	Dinner & Sacramento Nightlife on Your Own 6:30–10 PM	
6:00 PM	Group Walk to Mamma Mia 7 PM, Sheraton Grand Lobby		Emerging Leaders Mixer 8:30–9:30 PM Sheraton Grand
7:00 PM	Broadway Sacramento presents Mamma Mia 7:30–10 PM Wells Fargo Pavilion		
8:00 PM			
9:00 PM			
10:00 PM			
11:00 PM			

GREETINGS!



Stephen Wilson
President & CEO,
Fresno Philharmonic
*ACSO Conference
Chair*



Alice Sauro
Executive Director,
Sacramento
Philharmonic &
Opera
*ACSO Conference
Local Host*

Welcome to the 2018 ACSO Annual Conference hosted by the Sacramento Philharmonic & Opera!

We are thrilled to have ACSO back in Sacramento for the first time in twelve years. As we hope you will discover, California's capital city has a thriving cultural scene, beautiful neighborhoods, and a friendly small-town feel.

But the reason we are most excited to have you here is because, as the state capital, Sacramento is the perfect backdrop to discuss how policymaking influences the arts, and how the arts influence policymaking. When working together at their best, cultural policies should support access to the arts and promote inclusion and diversity within the arts. Likewise, the arts should help people be more connected to their communities and more aware of the world around them, and be an influence for change.

We challenge you to think deeply about the interplay between art and policy throughout this three-day conference. Don't miss Friday morning's plenary, which is a panel discussion with government and civic leaders about this very issue.

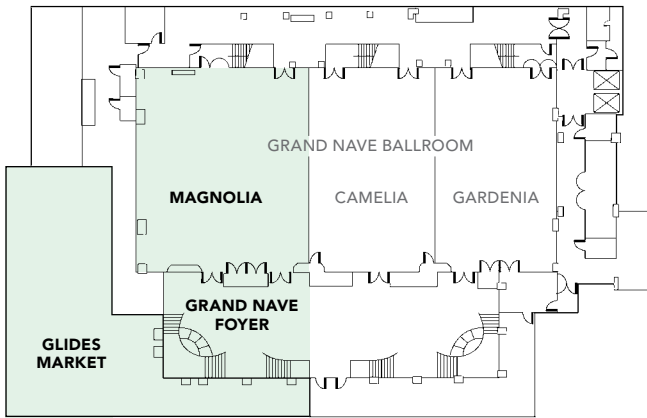
In addition, you will find an abundance of sessions to help your orchestra operate at its best, including audience development, fundraising, emergency preparedness, marketing, your own professional development, and much more. And of course, enjoy catching up with your colleagues and expanding your network.

We would like to thank the ACSO conference committee and board who have supported our planning efforts, and the ACSO staff for all their work to make this conference a reality.

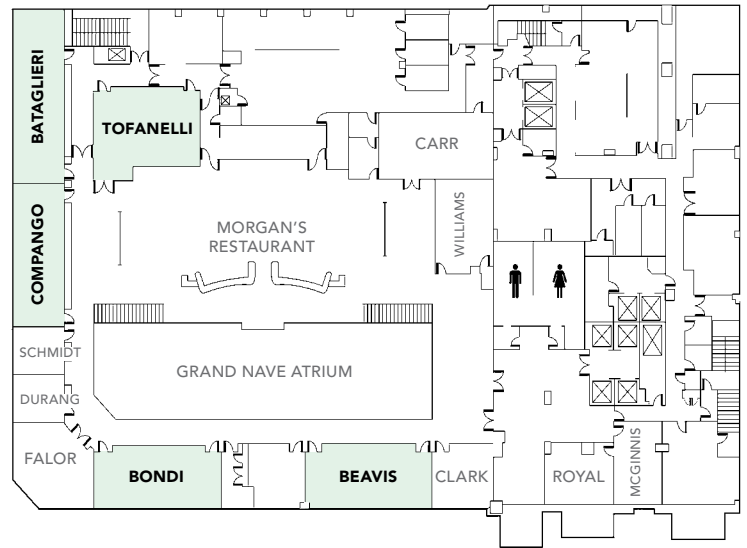
Conference wouldn't happen without your attendance, so thank you, enjoy, and welcome to Sacramento!

HOTEL MAP

LOWER LEVEL



LEVEL 2



AREA MAP



KEY

-  Sheraton Grand Hotel
-  1 California State Capitol Museum
-  2 Community Center Theater
-  3 Tequila Museo Mayahuel Restaurant
-  4 Wells Fargo Pavillion

THURSDAY, AUGUST 9

8:30 AM–5:00 PM

REGISTRATION/EXHIBITOR MARKETPLACE OPEN

Glides Market

Grab a cup of coffee and spend some time with our Exhibitors who will share information about their services, products, and support tools.

9:00–9:45 AM

CONFERENCE ORIENTATION (optional)

Bondi Room

Begin your 2018 Annual Conference experience on the right foot with this essential session that presents all aspects, enabling you to customize the conference to your specific needs and interest. Also, this session will answer the question “Does ACSO do anything besides the annual conference?” Spoiler alert: the answer is “YES!” You’ll get a brief overview of ACSO’s programs and services, and share your valuable feedback of what you’d like to see ACSO do more (or less) of in the future. Presented by ACSO board and staff members

Sponsored by Kathryn R. Martin Consulting

10:00–11:30 AM

OPENING PLENARY: MUSIC DIRECTORS – ONE SIZE DOES NOT FIT ALL

Magnolia Ballroom

Join us as we open the 2018 Annual Conference with remarks from ACSO



leadership, sponsors, and a special welcome from Assemblymember Kansan Chu, chair of the Assembly’s Arts, Entertainment, Sports, Tourism, and Internet Media Committee. He

will present a certificate to ACSO in recognition of fifty years of empowering our music community.

Then hear from a panel of music directors who come to the podium with different backgrounds, education, and life experiences. Some have been a fixture in their communities for years and some have newly arrived. Listen as they discuss their creative process, experience working within their communities, methods for building relationships with their musicians, and thoughts on the future of the field.

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Rei Hotoda,
music director,
Fresno Philharmonic



Michael Morgan, music director, Oakland Symphony and Bear Valley Music Festival



Alice Sauro, executive director, Sacramento Philharmonic & Opera



Scott Seaton, music director, North State Symphony

Moderator: **Alan Mason**, board president, Association of California Symphony Orchestras

Musical Moment provided by the Sacramento Philharmonic & Opera.

Featured brass quintet members include:

James Rodseth, trumpet
Michael Meeks, trumpet
Eric Achen, horn
Phil Tulga, trombone
Julian Dixon, tuba

Sponsored by Robert Swaney Consulting, Inc.

11:45 AM–1:00 PM

BREAKOUT SESSIONS

1 | Before the Flood (or Fire): Emergency Preparedness Strategies and Resources **BD** Bondi Room

From fires and mudslides to active-shooter situations and sudden personnel changes, performing arts organizations must deal with events ranging from minor emergencies to large-scale disasters. These unexpected events may disrupt performances or pose public relations concerns. This session will include brief updates from California colleagues who dealt with the 2017 wildfires and mudslides, and provide information on good practices for emergency preparedness and business continuity.

Tom Claresson, project director, Performing Arts Readiness Project

Jamei Haswell, board chair, Santa Rosa Symphony

Kevin Marvin, executive director, Santa Barbara Symphony

Janet Newcomb, performing arts coordinator, Performing Arts Readiness Project

Sponsored by Donna Williams

2 | Network Like a Star: Turning Casual Contacts into Lifelong Colleagues **EL** Bataglieri Room

Networking is the building block of any profession, but it doesn’t have to be work. Connecting to the people, places, and ideas that move your organization and your career forward can be as rewarding as it is fun. Mastering this art, including meeting preparation and participant research, goal setting, active listening, and engaged responding can help you build your circle of influence and make good friends. As a bonus, in this session you’ll also come away with expert advice on how to get out of

that conversation that's going nowhere and avoiding that topic you hate that everyone wants to ask you about. Get prepared for your next connecting opportunity by participating in this interactive session of facilitated tip-sharing, engagement exercises, and lots of fun. With a background in theater, and a knack for connecting to career gatekeepers, panelists will lead participants through networking skill-building activities that can be practiced throughout the rest of ACSO's annual conference to help build connections and strengthen networks.

Nicola Samra, executive director, Monterey Symphony

Scott Vandrick, chief development officer, Pasadena Symphony Association

John Wineglass, composer, JW Productions, LLC

3 | Six Strategies to Exponentially Improve Organizational Performance Campagno Room

No matter how large and successful an organization may be, almost every nonprofit feels it could use more cash to accomplish its work. Learn about six strategies that cost little to no money at all, but can produce an overly abundant return on investment. Implementing any of these six strategies can assist a nonprofit in reaching new operational and financial heights. However, incorporating all six into your organization's daily focus should exponentially increase its sustainability for years to come.

Paul Jan Zdunek, managing partner, BDO Alliance USA – strategyZ consulting group

4 | Unlocking the Door to Good Governance – Your Board Holds the Key Tofanelli Room

California residents benefit enormously from the many great orchestras that

exist throughout our state. These orchestras are sustained by generous donors and patrons, committed staff members, and boards of directors who bear a critical responsibility to govern in the most effective, ethical, and independent way possible. Too often, however, boards are comprised of good people who don't fully understand their governing role. Many boards struggle with issues of culture, structure, and focus, and senior staff members don't know how to effectively engage and deploy the organization's board. Join us for a session in which we will learn about principles of good governance and address related challenges facing board members and CEOs.

Terry Knowles, independent consultant for nonprofits and former CEO, Los Angeles Master Chorale

Sponsored by Stephen Wilson

1:00–2:15 PM

NETWORKING LUNCH ON YOUR OWN

2:30–3:45 PM

BREAKOUT SESSIONS

1 | Curating Your Career/Life: What's Next, and How Do You Really Know?

Bondi Room

Are you feeling like you may be at an important crossroads? Or feeling a pull towards creating a next chapter? Whether you are beginning, middle, or late-career, there's a lot of excellent career development advice and recruiting resources available to you – and many here at conference. But how do you know what's "right" for you? How long do you need to stay in your job? What is the best path to continue to advance and be successful? When is the right time

to retire, and what will you do next? The answers? They depend on what you (really) want – in terms of impact, living in your purpose, and work-life rhythm. The good news? You're already moving! Now leverage YOU to have the impact you are meant to achieve. Participants will be led through a series of exercises and mini-coaching to begin revealing their Strategic Trajectory and Impact Vocabulary, test assumptions, break through limiting beliefs, and create deeper insights on the Big Question: What should I do next?

Kathryn R. Martin, organizational and leadership coach

Nicola Samra, executive director, Monterey Symphony

Sponsored by John Wineglass

2 | Does Your Orchestra Need a Rebrand? The Good, the Bad, and the Ugly Bataglieri Room

Rebranding is more than changing your logo and tagline. It's your orchestra's personality, your promise to your members, and your value proposition. A successful rebrand could increase membership, member engagement, and revenue. But how do you know if a rebrand is right for you? And how do you determine the timing and the level of rebrand needed, get board buy-in, and measure ROI? Using a mix of interactive activities and presentation, get the information needed to help you determine whether your association needs a rebrand, to what extent, how to get buy-in, and how to launch and measure your efforts.

Mark Laturno, Principal, Laturno Marketing LLC

Donte P. Shannon, CAE, executive director, Specialty Advertising Association of California

Sponsored by Genevieve Macias

3 | Navigating a

Music Director Transition BD
Compagno Room

Music director transitions can be difficult for the organization, musicians, audiences, and the community. Successfully navigating one takes time, organization, and detail. Hear from leaders in the field who have addressed this transition from all different points of the process – from an orchestra having its new music director for just a year, an orchestra who just announced its new conductor, and an orchestra’s executive director who inherited the search in her first year. If you foresee a new music director in your near future, let the panelists’ experiences reduce some possible pain points in the process.

Catherine Lansdowne, executive director, San Luis Obispo Symphony

Alan Silow, president & CEO, Santa Rosa Symphony

Stephen Wilson, president & CEO, Fresno Philharmonic

4 | Who’s Sitting in Your Seats?

Leveraging Patron Data for Richer Engagement and Audience Development

Tofanelli Room

Most organizations only know one-third of the audience members sitting in their seats. The other two-thirds – or the non-ticket buyers – remain a mystery. New in-venue engagement technologies are changing the house map by de-anonymizing audience members and providing a full, 360-degree view of who sits in your seats on any given night. By linking ticket transaction data with on-site patron data – acquired via wifi, social check-ins, pixels, and native apps – your venue can employ applications in audience mining, local cross-promotion, and ancillary data monetization that lead to richer patron data, deeper relationships, and more effective marketing opportunities.

Sarah Hutton, director of sales, Choice Entertainment Technologies

4:00–5:15 PM

PEER FORUMS

Start a conversation, share ideas, ask questions, and offer opinions. In these give-and-take sessions, you can join your counterparts at other orchestras or meet with similarly-sized organizations to listen, learn, share, and collaborate. BD

Magnolia Ballroom

- **Development:** Genevieve Macias, executive director, Foundation for the Long Beach Symphony; Julia Ward, director, development communications and strategy, Los Angeles Philharmonic
- **Education and Community Engagement:** Wendy Cilman, director of education, Santa Rosa Symphony
- **Marketing, Communications, and Audience Development:** Oliver Theil, director of communications, San Francisco Symphony
- **Orchestra Operations:** Drew Flaherty, general manager, Pasadena Symphony Association

Compagno Room

- **Artistic Leaders and Musicians:** John Wineglass, composer, JW Productions LLC

Bataglieri Room

- **Board Members:** Lacey Huszcza, associate executive director, Los Angeles Chamber Orchestra; Mireya Asturias Jones, past board member, Los Angeles Philharmonic

Bondi Room

- **Managers with Budgets over \$1 Million:** Stephen Wilson, president & CEO, Fresno Philharmonic; Dorothy Wise, executive director, Santa Cruz Symphony

Tofanelli Room

- **Managers with Budgets under \$1 Million:** Sherri Frumkin, managing director, Peninsula Symphony; Bettina Swigger, executive director, Festival Mozaic

Sponsored by Alan Mason

5:30–6:30 PM

PRESIDENT’S RECEPTION

Tequila Museo Mayahuel Restaurant

This is an opportunity for ACSO to thank our Individual Donors and our Conference Sponsors at a casual gathering that includes drinks and light appetizers. Have a drink on us, network with one other, and know how much ACSO appreciates your support. *This reception is open by invitation to our Individual Members who have donated to ACSO in the past year. However, if you donate \$50 or more to our Fund-a-Need Initiative (see page 3), you are welcome to attend.*

7:00 PM

DEPART TO MAMMA MIA

Sheraton Grand Lobby

If you are attending *Mamma Mia* at the Wells Fargo Pavilion, meet in the hotel lobby to walk together as a group. The Pavilion is a five-minute walk from the Sheraton Grand.

7:30–10:00 PM

BROADWAY SACRAMENTO PRESENTS MAMMA MIA

Wells Fargo Pavilion

FRIDAY, AUGUST 10

8:30 AM–5:00 PM

REGISTRATION/EXHIBITOR MARKETPLACE OPEN

Glides Market

9:00–10:30 AM

MORNING PLENARY: ARTS AND POLICY

Magnolia Ballroom

Government officials and civic leaders want to build healthy communities that are socially, educationally, and economically vibrant for their constituents, and they make policies and laws accordingly. As orchestra leaders, we believe that access to arts and music are fundamental to healthy communities. This session will explore how orchestras secure a place at the policymaking table to advocate for the importance of government funding and support for the arts. Panelists will also discuss the impact of the current political climate on the arts in California and nationwide, and share ways that you can still be effective in your job even if policymakers don't always support funding for the arts and nonprofit sector.



Dennis Mangers, strategic advisor for arts and culture to Mayor Steinberg, City of Sacramento



Kristin Margolis, director of legislative affairs, California Arts Council



Jan Masaoka, chief executive officer, CalNonprofits



Heather Noonan, vice president of advocacy, League of American Orchestras

Moderator: **Mitch Menchaca**, executive director, Association of California Symphony Orchestras

Sponsored by **Sharon Simpson**

10:45 AM–12 NOON

BREAKOUT SESSIONS

1 | **A Seat at the Table: The Power of Collaborative Programming Models** Bondi Room

In the orchestra world, the music director sets the artistic agenda, but what happens when other voices are invited into the curatorial decision-making process? This session explores collaborative programming models that invite new perspectives to the table to help accomplish a variety of goals: engage new audiences, spur innovation, expand the boundaries of the art form, and address issues of equity and inclusion in our work. This panel brings together those at the forefront of exploring how expanding the curatorial dialogue can strengthen our artistry and our organizations without devolving into “programming by committee.”

Scott Harrison, executive director, Los Angeles Chamber Orchestra

Maia Jasper White, violinist, Los Angeles Chamber Orchestra & artistic director, Salastina

Raul Gomez, music director, Metropolitan Youth Symphony of Portland

Sponsored by **Aubrey Bergauer**

2 | **Audience Development: The Long-Haul Model – A New Paradigm that Solves the Problems of Audience Attrition, Churn, and Aging** Compagno Room

Over the last four seasons, after a calculated change in approach to audience development strategy, the California Symphony has dramatically grown its audience and donor base, counter to the trends for orchestras across the country. Called “The Long-Haul Model,” a disciplined focus on patron retention over the long-term has grown audiences by over 70%, increased subscription revenue (also

by over 70%), and nearly quadrupled the donor base. Executive Director Aubrey Bergauer will share the details of operational implementation of the model, how the model scales to different budget sizes, why the board should care, and how you can apply this work to serve your organization.

Aubrey Bergauer, executive director, California Symphony

Sponsored by **Sean Sutton**

3 | **From Silence to Sustainability – The Recovery of the Sacramento Philharmonic & Opera** **BD** Bataglieri Room

A year after its 2013 merger, the Sacramento Philharmonic & Opera had effectively ceased operations. With no performances scheduled, a depleted staff, and a few funds remaining against a massive debt, an exhausted board was left with answering the toughest question imaginable – is it time to declare bankruptcy and close forever? But the organization made the ambitious decision to continue, and through bold and imaginative focus, it not only recovered financially, but it charted a new artistic course that immersed the organization within its community. Today the organization has moved from instability to sustainability, while still expanding its artistic commitment to the Sacramento community. Attendance and fundraising are at all-time highs. This session serves as the case study of the Sacramento Philharmonic & Opera's recovery and a learning opportunity to other organizations challenged with creating a bright, sustainable future.

Laurie Nelson, immediate past board chair, Sacramento Philharmonic & Opera

Alice Sauro, executive director, Sacramento Philharmonic & Opera

Bob Swaney, founder & CEO, Robert Swaney Consulting, Inc.

**4 | Meet the California Arts Council
Tofanelli Room**

This session provides a broad overview of the types of state resources (money and otherwise) that are relevant to the work of orchestras. Arts Council staff will present a summary of the 2019 CAC grant programs and discuss case study/project highlights about projects by orchestras that have successfully been funded.

J. Andrea Porras, arts program specialist, California Arts Council

12:15–2:15 PM

**AWARDS LUNCHEON AND
AFTERNOON PLENARY:
ARTS, CULTURE, AND THE
PURSUIT OF SOCIAL PROSPERITY**

Magnolia Ballroom



Audience development expert **Matt Lehrman** offers a candid and thought-provoking examination of the changing nature of relevance and how arts and cultural leaders can guide their organizations to new foundations of significance and value. For more than 30 years Lehrman has studied, practiced, and innovated at the intersection of marketing and customer engagement in a career spanning government affairs, banking, and arts and cultural management.

Sponsored by The Alan & Susan Seidenfeld Charitable Trust

The ACSO Awards Program follows the plenary with a presentation to recognize remarkable individuals and organizations for their meaningful contributions to the orchestra field.

- The **Kris Sinclair Leadership Award** is given to an ACSO Organizational Member that demonstrates impactful leadership initiatives which advance the goals of their organization. The award is presented by **Kris Sinclair**, ACSO executive director emeritus.
- Initiated in 1996, the **Most Valuable Player Awards** were created to recognize exemplary volunteers, volunteer

projects, and volunteer organizations working for symphony orchestras and choruses. These awards are presented by **Dean McVay**, ACSO board member.



Musical Moment provided by the Sacramento Master Singers.

*Ralph Hughes, artistic director
Susan Lamb Cook, cello*

2:30–3:45 PM

BREAKOUT SESSIONS

**1 | Exploring Arts Education
Bondi Room**

What does arts education mean to you and your orchestra? This session will explore the what, how, and why of providing arts-based experiences and education to young people in educational and community settings. The session will explore different models of excellence and discuss issues such as funding, partnerships, and educational policy.

Sunshine Deffner, operations & education director, California Symphony

Josy Miller, arts education program specialist, California Arts Council

Adrienne Valencia, programs director, Arts for Learning San Diego

Sponsored by Dorothy Wise

**2 | How the New Federal Tax Law
Impacts Your Orchestra BD
Bataglieri Room**

This session reviews the operational changes nonprofits may need to make right away to comply with the new federal tax law; what orchestra leaders need to know about state and local policy changes as a result of the tax law; and the panelists' perspective on how the new federal tax law will impact fundraising activities of charitable nonprofits.

Jan Masaoka, president & CEO, CalNonprofits

Ryan Taylor, CPA, partner, Campbell Taylor & Company

Kerry Wood, CFRE, chief marketing & donor engagement officer, Sacramento Region Community Foundation

Sponsored by BDO Alliance USA – strategyZ consulting group

**3 | The Joy of Fundraising BD
Compagno Room**

Executive directors and board chairs have limited time and competing priorities that are often times at odds with their fundraising and relationship-developing responsibilities. This session helps identify and overcome those challenges so that the orchestra leadership gains a better understanding of how to define the volunteer, artist, and staff roles in fundraising, learns how to prioritize fundraising and make it an efficient part of the daily routine, and creates a high-leverage/high-return fundraising program. This is a fun and interactive session designed for CEOs and board chairs, as well as other leadership staff and board volunteers.

Bob Swaney, founder & CEO, Robert Swaney Consulting, Inc.

**4 | One Big Thing: Connecting to
Your Orchestra's (Existing) Impact
to Catapult you to Success!
Tofanelli Room**

Is your board engagement low? Are donations flat or declining? Is your staff at risk of being burned out? Are opportunities not being leveraged even when operational goals are met and the budget is balanced? This interactive session will show you one big thing that you can do to make a difference – and it won't cost you anything. Experience KRM's FastTrack process for visioning/board engagement/strategic planning/branding/revenue-generation...all rolled into one! Bring your colleagues (board, staff, and artistic personnel) and get at your organization's core purpose, begin to create your Impact Vocabulary, and learn how to create momentum.

Kathryn R. Martin, organizational and leadership coach

Dean McVay, board president, San Bernardino Symphony

Sponsored by Dean McVay

4:00–5:15 PM

PEER FORUMS REDUX

Continue the conversations and sharing that you started in Thursday's peer forum sessions, with an added bonus session just for Emerging Leaders. **BD** **EL**

Magnolia Ballroom

- **Development:** Genevieve Macias, executive director, Foundation for the Long Beach Symphony; Julia Ward, director, development communications and strategy, Los Angeles Philharmonic
- **Education and Community Engagement:** Wendy Cilman, director of education, Santa Rosa Symphony
- **Marketing, Communications, and Audience Development:** Oliver Theil, director of communications, San Francisco Symphony
- **Orchestra Operations:** Drew Flaherty, general manager, Pasadena Symphony Association

Compagno Room

- **Artistic Leaders and Musicians:** John Wineglass, composer, JW Productions LLC

Bataglieri Room

- **Board Members:** Lacey Huszcza, associate executive director, Los Angeles Chamber Orchestra; Mireya Asturias Jones, past board member, Los Angeles Philharmonic

Bondi Room

- **Managers with Budgets over \$1 Million:** Stephen Wilson, president & CEO, Fresno Philharmonic; Dorothy Wise, executive director, Santa Cruz Symphony

Tofanelli Room

- **Managers with Budgets under \$1 Million:** Sherri Frumkin, managing director, Peninsula Symphony; Bettina Swigger, executive director, Festival Mozaic

Beavis Room

- **Emerging Leaders:** Giuliano Kornberg, development manager, Sacramento Philharmonic & Opera

Sponsored by Alan Mason

5:30–6:30 PM

OVERTURE PARTY WITH THE SACRAMENTO PHILHARMONIC & OPERA

Community Center Theater Lobby

Enjoy a short storybook concert and catch up with colleagues over a glass of wine at a free reception open to all conferees.

Sacramento Philharmonic & Opera's "WolfGANG!" presents Prokofiev's "Peter and the Wolf – A Musical Tale," arranged for woodwind quintet by Curtis Kidwell. Featured musicians include:

*Elizabeth Coronata, flute
Eric Kidwell, oboe
Sandra McPherson, clarinet
David Wells, bassoon
Eric Achen, horn
Julian Dixon, storyteller*

Sponsored by Jeri Crawford

8:30–9:30 PM

EMERGING LEADERS MIXER **EL**

Sheraton Grand Hotel

If you have been in the field for less than five years, come and network with your fellow emerging leaders. Create bonds and friendships that will last for the rest of your career! This reception includes light appetizers and one drink ticket.

DINNER & SACRAMENTO NIGHTLIFE ON YOUR OWN

Visit Sacramento (visitsacramento.com) is a great resource to find delicious restaurants that offer ACSO conference attendees a discount through the Show Your Badge Program (see page 3 for details).

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SATURDAY, AUGUST 11

8:30 AM–1:00 PM

**REGISTRATION/EXHIBIT
MARKETPLACE OPEN**

Glides Market

9:30–10:30 AM

ANNUAL MEETING BREAKFAST
Magnolia Ballroom

Meet ACSO’s new board members and officers, and learn about its financial health, new strategic plan, and future initiatives.

Alan Mason, ACSO board president

Sean Sutton, ACSO president-elect & treasurer

Bettina Swigger, ACSO secretary and governance chair

Mitch Menchaca, ACSO executive director

TALON SMITH

Pianist & Composer

*Musical Moment provided by
Talon Smith, piano.*

10:45 AM–12 NOON

BREAKOUT SESSIONS

**1 | The Art and Science of Pricing:
A How-To Guide for Maximizing
Earned Revenue Potential**
Bataglieri Room

Many orchestras face internal pressure to increase earned revenue each year. How often should you increase prices and by how much? Are your patrons fatigued? Do promotional efforts continue to erode potential gains? How do your audience development goals fit into the equation? This session examines a variety of factors that impact pricing decisions and provides insights on when and how to implement both variable and dynamic pricing. Learn data-driven techniques to measure audience demand,

inform pricing decisions, and gain practical solutions to increase ticket revenue results with relative ease.

*Cindy Grzanowski, vice president,
Arts Consulting Group*

**2 | Juggling the 5 Big Ps
(Purpose, People, Passion, Politics,
and Perspective) – Tales from the
Frontlines**

Tofanelli Room

Things don’t always go exactly as planned. The best nonprofit strategies are sometimes hijacked by the people and passions you thought you understood. This discussion will feature arts management professionals who will tell tales from the frontlines of those occasions when the 5 fundamental “Ps” of nonprofit administration – Purpose, People, Passion, Politics, and Perspective – got out of balance. Learn how the best intentions came tumbling down into a rubble pile of wishful thinking and hard knocks, and the hear about the lessons learned as each faced the 5 Ps once again. This reality-check session will be filled with anecdotal tales of those times when even seasoned professionals misstep. Designed to bring out empathy among colleagues, the session will reaffirm that by keeping an open mind and the mission of your organization in sight, clashes among the 5 Ps only make us stronger leaders.

*Julian Dixon, senior director of
community engagement and education,
Sacramento Philharmonic & Opera*

*Annie Schmidt, development director,
Fresno Philharmonic*

*Bettina Swigger, executive director,
Festival Mozaic*

*Scott Vandrick, chief development
officer, Pasadena Symphony Association*
Moderator: *Sarah Weber, membership &
development manager, ACSO*

Sponsored by Mireya Asturias Jones

12:30–3:30 PM

**POWER SEMINAR:
AUDIENCES EVERYWHERE
WITH MATT LEHRMAN**

Magnolia Ballroom

The hibernation is over! It’s time to restore ambition to nonprofit arts organizations, too long hunkered down against the harsh chill of a wintery economic landscape. It’s time to re-engage audiences with extraordinary experiences. Audiences Everywhere goes far beyond a marketing workshop. Discover a whole-organization approach to understanding your audience – and use those insights to blow away conventional wisdom, energize and advance your mission in new ways, and inspire innovation at every level of your organization. There is a \$75 fee for this seminar that includes a boxed lunch. Payment can be made onsite at the conference registration table.

*Matt Lehrman, management consultant,
Audience Avenue, LLC*

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SPECIAL THANKS

Many thanks to our 2018 Host, the Sacramento Philharmonic & Opera.

Thank you to all the conference volunteers who worked hard to ensure that our attendees had an amazing experience!

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(Gifts as of June 30, 2018)

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With RSC coaching, the **Amarillo Symphony** surpassed its Annual Fund goal and had a record-setting fundraising year - increasing contributed revenue by 174%.

Through an RSC partnership, the **Sacramento Philharmonic & Opera's** Annual Fund grew from just over \$400,000 in 2014 to now over \$1,000,000 in 2018. The number of annual donors has doubled over this same period and is poised for additional growth. With continued coaching from RSC, the organization recently launched a multi-million-dollar Major Gift Initiative that will address long-term sustainability.

Over a 12-month campaign, RSC counsel helped broaden **Huntsville Symphony Orchestra's** donor base by more than 50% and overall annual contributed revenue by 20% over the prior fiscal year.

In its partnership with RSC, the **Dallas Symphony Orchestra** added 800 donors, and improved the Annual Fund over \$350,000 from the previous year.

RSC created a Fundraising Action Plan that could be swiftly implemented by **Orchestra Kentucky** to accelerate results. In three months, they raised \$170,000 and achieved 92% of their contributed revenue goal with four months remaining in the fiscal year.



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