

A | C | S | O

50TH ANNIVERSARY
1969–2019

ASSOCIATION OF CALIFORNIA
SYMPHONY ORCHESTRAS

2019 ANNUAL CONFERENCE

August 8–10, 2019 | Embassy Suites by Hilton Monterey Bay Seaside

Making Waves: Began in Monterey, Beyond California



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WELCOME



Ian N. Oglesby
Mayor
City of Seaside

Welcome to Seaside! As Mayor of Seaside, it's an honor and a pleasure to welcome you to the ACSO 2019 Annual Conference "Making Waves: Began in Monterey, Beyond California," commemorating 50 years of service to the classical music field and countless fans around the world.

I extend a special greeting to each of you and your guests as you convene for a time of skills development, relaxation, fun, and networking "like a star."

I hope you will have an opportunity to experience and enjoy the many sights, sounds, and tastes that Seaside has to offer. No matter where you go or what you do, I trust your stay will be enjoyable because of the warm and welcoming atmosphere created by the citizens of Seaside. Come back and visit again, soon.

On behalf of the citizens of Seaside and Monterey County, again I warmly welcome you to our great city and extend my most sincere wishes for a productive and successful Conference.

It's nice having you in Seaside! Make Waves!



Clyde Roberson
Mayor
City of Monterey

Welcome to the Association of California Symphony Orchestras' (ACSO) 2019 Annual Conference!

On behalf of the Monterey City Council and citizens of Monterey, I am pleased to welcome you to Monterey, a special place with a rich history, diverse culture, and stunning beauty. We are especially delighted to host ACSO this year, since this is a homecoming for all of you!

We have so much to offer visitors, so please avail yourselves of our world-renowned wine, food, and scenery if you have free time between interesting sessions, plenaries, and networking events! You are sure to leave with wonderful memories of Monterey, and we look forward to your next visit.

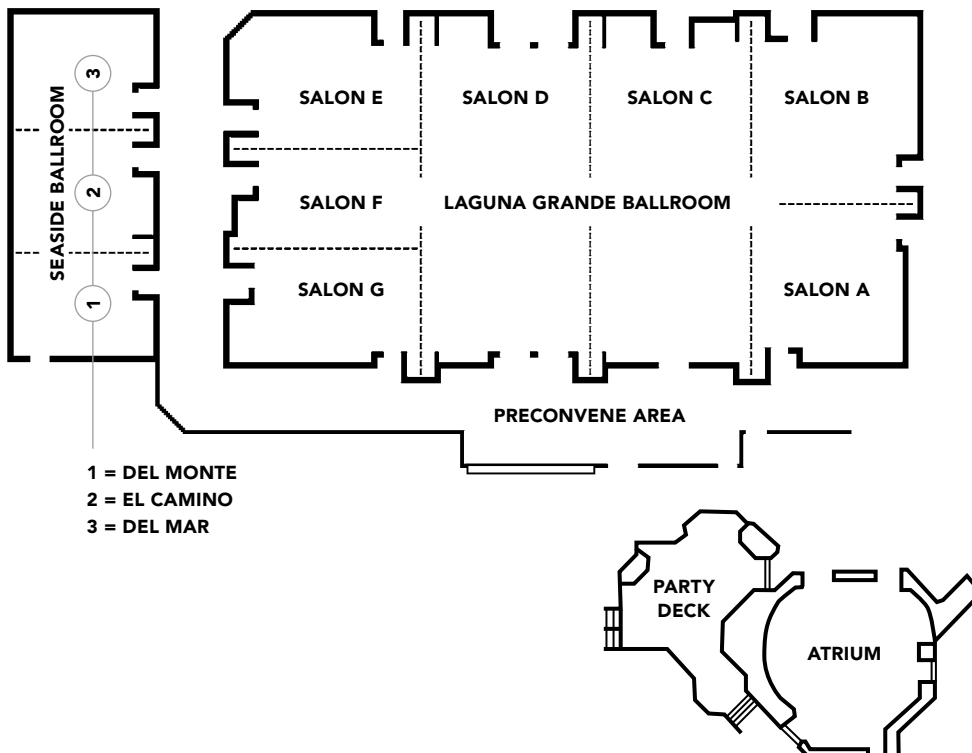
Through your and others' efforts, orchestral music is alive in our schools and at community events and festivals. Here's to the next 50 years.

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EVENT LOCATIONS

HOTEL MAP





Sean Sutton
Board President

Welcome to Making Waves, our 50th Anniversary ACSO conference! The first formal gathering of

California orchestras took place at Asilomar on the Monterey Peninsula in 1969. Together we can *relax* in beautiful Monterey to explore what's possible in creating vibrant and healthy music organizations. Can we be unabashedly relevant and easily accessible throughout California? Let your mind and spirit expand so that the music sounds sweeter, the wine tastes richer, and the laughter rings louder, because you are here with colleagues and friends.

We will have fun learning, reflecting, sharing ideas, and having honest conversations. All are welcome—many points of view and perspectives are encouraged. ACSO's goal is to provide an inspirational atmosphere supporting your ability to uniquely serve your music community.

Thank you to our gracious, generous hosts from Monterey Symphony. ACSO Conference Co-Chairs Nicola Reilly and Aubrey Bergauer have been working with a dedicated committee and new Executive Director Sarah Weber to bring you an astounding lineup of speakers, presenters, and panelists. There is a broad spectrum of subjects to delve into, and we are delighted to have attendees from across the state and western region. Please introduce yourself and find out who else is on this adventure. The content at this gathering is so interesting; I want to go to everything!

You and your organization are investing time and valuable resources—ACSO salutes you for that dedication. With this concentration of energy, we will also celebrate together at a specially curated 50th Anniversary Party (including an ensemble performance) at the Monterey Bay Aquarium. Enjoy an evening of appetizers, drinks, and celebration in an entirely refreshing environment.

The future of classical music is bright and magical with your enthusiasm and passion. Enjoy discovering in the Monterey Bay area at ACSO's *Musiquarium!*



Sarah Weber
Executive Director

I am very fortunate that my first year as ACSO's new executive director coincides with our 50th Anniversary and the incredible opportunity we have to come home to Monterey, the place where ACSO was born, and celebrate together at the 2019 Annual Conference. I feel honored to build upon the incredible work that was done by past ACSO board and staff members and to help move ACSO into its next 50 years of service to our field.

The work you do matters, and I can say that firsthand. I started playing the violin as a very young child and I am a product of school, youth, and community orchestras. Beyond teaching me to read music and giving me the discipline to play an instrument, orchestras gave me life-long friends, a sense of belonging, caring mentors, and an identity. And it didn't matter whether or not I grew up to play the violin professionally (spoiler: I didn't). I got so many intangible gifts because there were orchestras I could be a part of and I could be inspired by.

So please carry that thought with you through the next three days as you reconnect with your friends and colleagues and welcome new faces to the fold. Your work matters!

And ACSO is here to help you, first and foremost by organizing this incredible convening. We have pulled out all the stops—the sessions are phenomenal, and our plenary speakers are the biggest names in their respective professions. You are guaranteed to leave Monterey ready to make some waves at your organizations and in your communities.

I want to thank the ACSO staff and board, especially the conference committee, for their tireless work. I also want to thank the Monterey Symphony for doing so much behind the scenes to make our experience unforgettable. And I want to thank all of our exhibitors and sponsors, and especially our lead sponsor—Choice Entertainment Technologies.

Finally, thanks to you, our members. ACSO wouldn't exist if you didn't find value in participating in this network of classical music organizations and advocates. Let's keep going strong for another 50 years!

SCHEDULE AT A GLANCE

WEDNESDAY, AUGUST 7

Pre-Conference Workshop: Small Budget Orchestra Fundamentals
2:00–5:00 PM, Laguna Grande B

	THURSDAY, AUGUST 8	FRIDAY, AUGUST 9	SATURDAY, AUGUST 10
8:00 AM			
9:00 AM	<p>Orientation/Networking Like A Star 8:15–8:45 AM, Laguna Grande C–D</p>		
10:00 AM	<p>Welcome Remarks and Opening Plenary by Nina Simon 9:00–10:30 AM Laguna Grande C–D</p>	<p>Morning Plenary by Vu Le 9:00–10:30 AM Laguna Grande C–D</p>	<p>Closing Remarks and Closing Plenary by Patty McCord 9:00–10:30 AM Laguna Grande C–D</p>
11:00 AM	<p>Breakout Sessions 11:00 AM–12:15 PM Various Locations</p>	<p>Breakout Sessions 11:00 AM–12:15 PM Various Locations</p>	<p>Breakout Sessions 11:00 AM–12:15 PM Various Locations</p>
12:00 PM			
1:00 PM	<p>Annual Meeting and Awards Luncheon 12:30–2:00 PM Laguna Grande C–D</p>	<p>Networking Lunch on Your Own 12:30–2:00 PM</p>	
2:00 PM			<p>Post-Conference Masterclass: Equity, Diversity, and Inclusion in Everyday Practice with Vu Le 12:30–3:30 PM Laguna Grande C–D</p>
3:00 PM	<p>Breakout Sessions 2:15–3:30 PM Various Locations</p>	<p>Breakout Sessions 2:15–3:30 PM Various Locations</p>	
4:00 PM	<p>Peer Forums 3:45–5:00 PM Various Locations</p>	<p>Peer Forums Redux 3:45–5:00 PM Various Locations</p>	
5:00 PM			
6:00 PM		<p>President’s Reception 5:30–7:00 PM Seaside Ballroom</p>	
7:00 PM	<p>Transportation to Monterey Bay Aquarium, Hotel Entrance</p>		
8:00 PM			
9:00 PM	<p>ACSO’s 50th Anniversary Party 7:00–10:30 PM Monterey Bay Aquarium</p>	<p>Emerging Professionals Mixer 8:00–10:00 PM Art gallery and photography studio of Manny Espinoza</p>	
10:00 PM			
11:00 PM			

GREETINGS!



Aubrey Bergauer
Executive Director,
California Symphony
Conference Co-Chair



Nicola Reilly
Executive Director,
Monterey Symphony
Conference Co-Chair

If you're reading this letter, you're a smart person. This we know because you're here, in Monterey, where ACSO began 50 years ago and where we are spending the next few days launching into not only the Association's next chapter, but into your orchestra's future as well. All of the content at this gathering was specifically chosen to do just that: propel us forward.

This year, we're doubling down on what lies ahead of us all. From artistic programming in a changing world, to new trends in marketing and fundraising, to a full day of content just to strengthen our boards, to a pre-conference session designed solely for smaller budget organizations who know they want and need to punch above their weight, to a 50th anniversary party in the world-renowned Monterey Bay Aquarium, to a session the following day on how that banner organization has used advocacy to raise their voice and profile on a national level. We're presenting plenary speakers from outside the orchestra world to inspire us. We're bringing in breakout session experts from across the country on diversity, education, misconduct, digital marketing, case-making, and more. We're ready to make some waves.

In so many ways, this is what ACSO has always been about: serving the hundreds of different and varied ensembles that make up the musical fabric of our state, welcoming everyone to participate—including now several member organizations from outside California (we see you, Nevada, Arizona, and Oregon!), and creating a network of learning so that all of us in this business together can advance our art and our organizations. For 50 years, ACSO has uniquely connected us and the work we do, and for just as long—and longer for some of our members—the orchestras of this state have been leaders in our field that others look to follow. What began in Monterey in 1969 has grown beyond California.

So thank you for being a smart person. Thank you for being someone who invests in professional development and believes in looking for new ideas and inspiration. Thank you for being here and having these conversations so that we're not the same institutions tomorrow that we are today. Here's to the next 50 years!

Let's make some waves!

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 8: 8:00 AM–5:00 PM

Friday, August 9: 8:00 AM–5:00 PM

Saturday, August 10: 8:00 AM–1:00 PM

Morning coffee service is available each day in the Exhibitor Marketplace from 8:00–11:00 AM.

Sponsored by ASCAP

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 2020 Annual Conference.

Don't forget to like and follow us:



VIDEO TESTIMONIALS

Look for us in the registration area so you can share your ACSO story!

ACSO turns 50 this year, so tell us how ACSO has impacted you or your organization over the years. Speak to us for a minute or two on video and become eligible to win a free three-day registration to the 2020 Annual Conference! It's easy—we'll give you prompts, and you have more than one chance if you don't like the first take. We'll use the video in social media and future ACSO promotional videos. You can complete one or more of these prompts:

- What I like best about ACSO is:
- The way ACSO has made an impact on my orchestra is:
- My favorite memory from an ACSO conference is:

"FLASH YOUR BADGE" FOR RESTAURANT AND ACTIVITY DISCOUNTS

The Monterey County Convention and Visitors Bureau has collaborated with the local community to offer ACSO conference attendees discounts and promotions with an exciting array of restaurants and merchants. Over 50 restaurants, vendors, shops, and vineyards offer discounts when you show your badge. You can enjoy this beautiful region in your downtime with discounted whale watching, shopping, dining, and local wine tastings. Pick up a brochure at the registration table or visit www.seemonterey.com/meetings/promote/flash-your-badge for details.

MAKE THE MOST OF YOUR CONFERENCE WITH SESSION TRACKS

Feeling overwhelmed? Get on the right track! ACSO has suggested "tracks" of sessions and activities that are well-suited to specific interests, themes, and career paths. You will find the icons below after the session titles in the conference schedule (which starts on page 6).

- Development/Fundraising **DF**
- Education/Community Engagement **EC**
- Marketing/Communications **MC**
- Operations/Administration **OA**
- Artistic/Programming **AP**
- Board/Governance **BG**
- Emerging Professionals **EP**
- Diversity, Equity, and Inclusion **DEI**

WEDNESDAY, AUGUST 7

2:00–5:00 PM

PRE-CONFERENCE WORKSHOP:

Small Budget Orchestra Fundamentals

DF MC OA BG

Laguna Grande B

One of the most-requested topics in past conference feedback (yes, we read your survey responses!), this three-hour seminar is designed specifically for those orchestras with small budgets (\$1 million and under) which are led primarily by volunteer boards with few, if any, staff members. It will cover the latest best practices in small orchestra management and drill down on areas of focus that ensure success. This is a rare opportunity to hear and learn from two leaders who have worked with organizations of all sizes and know firsthand what to do with the leanest budgets, what to prioritize when you know it's impossible to do it all, and what works and what doesn't so your small organization can thrive.

Cristine Kelly, Founder and Director, Fix Creative

Bob Swaney, Founder and CEO, Robert Swaney Consulting

Sponsored by Aubrey Bergauer and Jeri Crawford

THURSDAY, AUGUST 8

8:00 AM–5:00 PM

REGISTRATION/EXHIBITOR MARKETPLACE OPEN

Preconvene Area and Party Deck

8:15–8:45 AM

CONFERENCE ORIENTATION AND NETWORKING LIKE A STAR

Laguna Grande C–D

Welcome to conference! We're combining the what-you-need-to-know with one of last year's highest-rated sessions in this quick orientation. You'll get the lay of the land here in Monterey, plus come away with top networking tips and networking "No-Nos" so you're prepared to make the most of your time at conference and meet as many people as possible in the least awkward way. And with these ACSO Board members leading you, you're likely to belly laugh through it all.

Nicola Reilly, Executive Director, Monterey Symphony, Conference Co-Chair

Scott Vandrick, Chief Development Officer, Pasadena Symphony and POPS
Sponsored by the Carmel Bach Festival

9:00–10:30 AM

OPENING PLENARY:

OF/BY/FOR ALL By Nina Simon
Laguna Grande C–D



Many classical music organizations are working to deepen community participation and relevance. How can we do it at scale...and learn from each other along the way? Forty diverse organizations—symphonies, museums, libraries,

theaters, parks, and health centers—are working together to do just that. These organizations are part of OF/BY/FOR ALL, a global initiative to help civic and cultural organizations become OF, BY, and FOR their communities. OF/BY/FOR ALL founder and best-selling author Nina Simon will share lessons learned from these efforts to deepen community involvement and organizational sustainability. Get inspired, get new tools, and get ready to make your institution stronger by becoming OF/BY/FOR ALL.

Nina Simon, Founder and CEO of OF/BY/FOR ALL and former Executive Director of the Santa Cruz Museum of Art & History

Nina's book, The Art of Relevance, will be available for purchase onsite and she will be signing copies immediately after her presentation.

Sponsored by the Community Foundation for Monterey County

11:00 AM–12:15 PM

BREAKOUT SESSIONS

1 | From Harassment to Civility: Creating and Sustaining Culture in the #MeToo Era **OA DEI**
Laguna Grande A

The #MeToo movement and shows like *Big Little Lies* (filmed in Monterey!) are forcing institutions to prepare for serious plot twists that aren't just a Nicole Kidman scene, but are severe, real-life allegations. So what do we do when accusations arise about sexual harassment or misconduct? The best workforce practices are equal

parts 1) preventing bad things from happening, and 2) defining and encouraging behavior that you want your team to emulate. Creating such a culture is essential, though even if you do there's always a chance that a harassment issue will happen at your organization. Perhaps it already has. This presentation will discuss the critical issues surrounding harassment in the workplace that go far beyond the minimum legal mandates.

Eric Swenson, Managing Director & Head of Workforce Management, RSJ Swenson

Sponsored by Dean McVay

2 | Help Me Help You: What Orchestra Management Needs from the New Music Community **AP** **DEI** Laguna Grande E-F

It's not that management doesn't want to program new and diverse music. They just have revenue goals, and donors to please, and boards with opinions. So how can we all—composers, conductors, administrators, patrons, advocates—help to expand the programming of American orchestras? And how can the new music community help administrators make living composers part of their orchestras' daily diet? Patrick Castillo joins forces with Juilliard-trained composer Dr. Vivian Fung to discuss how we can help each other. Hear what management needs composers to understand and what management can learn from composers, so we're all supporting each other in our joint quest to update our programming and our art.

Patrick Castillo, Founding Composer and Director, Third Sound; Executive Director, Hotel Elefant

Vivian Fung, Composer Affiliate, Fresno Philharmonic and San Jose Chamber Orchestra

Sponsored by Stephen Wilson

3 | Stop Cultivating Millennials: The Boom of Empty Nesters Ripe for the Arts **DF** **MC** Laguna Grande B

Ok, don't actually stop cultivating millennials. But while symphony orchestras are collectively spinning our wheels trying to reach and attract this elusive generation, a wave of Gen Xers and Boomers are becoming empty nesters with time, money, and interest in not only buying single tickets to cultural events but are looking to invest in subscriptions, volunteer, and contribute to the cultural vibrancy of their cities. In a world of limited time and resources, this session helps to focus on this valuable audience segment and prioritize, target, and reach this wave of top prospects.

Jenie Dahlmann, Senior Director of Marketing, San Diego Symphony

Jacques Spitzer, Chief Creative Officer, Raindrop

Sponsored by Mitch Menchaca

12:30–2:00 PM

ANNUAL MEETING AND AWARDS LUNCHEON Laguna Grande C-D

The Annual Meeting gives members the chance to meet ACSO's new board members and officers and learn about its financial health, strategic progress, and future initiatives. We will also enjoy celebratory cake together while wishing ACSO a happy anniversary, reflecting on its past successes and recognizing its past leadership, and looking toward the future of our field.

The ACSO Awards Program recognizes remarkable individuals and organizations for their meaningful contributions to the classical music field. The **Kris Sinclair Leadership Award** is given to an ACSO organizational member that demonstrates impactful leadership initiatives which advance its goals. Initiated in 1996, the **Most Valuable Player Awards** were created to recognize exemplary volun-

teers, volunteer projects, and volunteer organizations working to support symphony orchestras and choruses.

All conference attendees are invited to attend this luncheon at no additional cost.

Sponsored by Sharon Simpson and by Rod Dewar, in memory of Sue Dewar

2:15–3:30 PM

BREAKOUT SESSIONS

1 | Artistic Leadership in a Changing World **AP** **OA** Laguna Grande B

Change is the only constant. Populations shift. Technology speeds up. Everyone's a curator, and public discourse is a battlefield. We've invited three visionary artistic leaders to share their curatorial philosophies and predictions for the future based on trends in cultural consumption, entrepreneurship, and the issue of representation. What type of programming serves our changing world? How does classical music and its presentation evolve along with our industry and our communities? What part do musicians, composers, and audiences play in our curatorial dialogues as we strive to invent the future through the artistic investments we make today?

Donato Cabrera, Music Director, California Symphony and Las Vegas Philharmonic

Laura Jackson, Music Director, Reno Philharmonic

Chad Smith, Chief Operating Officer, Los Angeles Philharmonic; Artistic Director, Ojai Music Festival

Moderator: Julia Ward, Director, Humanities, Los Angeles Philharmonic

Sponsored by Aubrey Bergauer

2 | Telling Your Story in a Digital Universe MC

Laguna Grande E-F

As arts marketers, we wear a lot of hats. Our to-do lists are a mile long and we rarely have an opportunity to brainstorm creative and inspiring ideas. Yet, the pressure is on. With a constant stream of social content fighting for people's attention, how well are you reaching your audience online? This workshop will give you the tools you need to create compelling content. You will learn how to find your social voice and empower your constituents to share their stories. This session will also include tips for creating great advertising content through these channels, so you can put your content to work for you.

Priya Iyer, Digital Marketing Consultant, Capacity Interactive

Sponsored by Sean Sutton

3 | Never Launch Another Endowment Campaign Again. Ever. DF

Laguna Grande A

An underpinning of most orchestra business models is the endowment. But an endowment campaign is a major undertaking, which can become a tremendous drain of time and focus for leadership. But there is an alternative to the endowment campaign cycle that is mission-focused, donor-focused, and growth-focused—and still delivers for this crucial revenue component. Hear Bob Swaney present the keys to tying orchestra's strategic plan and donors together to create a major gift program that builds your endowment program organically, without the traditional campaign investments. This session will also tie endowment fundraising to recurring giving so that your annual fund grows side-by-side with your endowment, creating a fundraising

system that is integrated seamlessly into an orchestra's daily culture.

Bob Swaney, Founder and CEO, Robert Swaney Consulting

Sponsored by George and Patricia Yellich

3:45–5:00 PM

PEER FORUMS

All forums in Laguna Grande C–D except for Board Members and Managers with Budgets over \$1 Million (see below).

DF EC MC OA AP BG EP

Start a conversation, share ideas, ask questions, meet new people, 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.

- **Development:** Scott Vandrick, Chief Development Officer, Pasadena Symphony and POPS
- **Education and Community Engagement:** Sunshine Deffner, Director of Operations and Education, California Symphony; Loribeth Gregory-Beck, Director of Education and Community Engagement, Santa Barbara Symphony
- **Marketing, Communications, and Audience Development:** Scott Seward, Director of Marketing and Communications, Carmel Bach Festival
- **Orchestra Operations:** Seth Ducey, Executive Director, Golden State Youth Orchestra
- **Artistic Leaders and Musicians:** Scott Seaton, Music Director, North State Symphony; John Wineglass, Composer, JW Productions LLC
- **Board Members (Laguna Grande G):** Mireya Asturias Jones, Volunteer, Los Angeles Philharmonic Affiliates; Dean McVay, and Board President, San Bernardino Symphony



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- At a "Crossroads" Moment?
- Board/Staff Challenges?
- Leadership Transition?

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Let's talk.

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ACSO'S 50TH ANNIVERSARY PARTY

7:00–10:30 PM | MONTEREY BAY AQUARIUM

- **Managers with Budgets over \$1 Million** (Peninsula Board Room): Kathryn Martin, Leadership Transition Strategist/Executive Coach, Kathryn R. Martin Consulting
- **Managers with Budgets under \$1 Million:** Anne Viricel, Executive Director, San Bernardino Symphony
- **Emerging Leaders:** Caitlin Fillmore, Development and Special Events Coordinator, Monterey Symphony

Sponsored by Lee and Shirley Rosen

6:30 PM

TRANSPORTATION TO ACSO'S 50TH ANNIVERSARY PARTY

Meet in the hotel lobby with your ticket in order to board the buses.



PHOTO COURTESY OF SEEMONTEREY.COM

A leader in ocean conservation and education, the Monterey Bay Aquarium is considered by many to be the best in the world and receives around two million visitors each year. Normally, this means your visit to this sardine-factory-turned-aquatic-wonder is surrounded by thousands of tourists. For ACSO's 50th anniversary party, it means we will enjoy appetizers, drinks, and visiting with

colleagues with the exhibits to ourselves. And with the sun setting over Monterey Bay as our backdrop, the reception will include a chamber performance from John Wineglass' stunning orchestral composition *Big Sur: The Night Sun*.

This performance will feature: Kanyon Sayers-Rood, native singer; Emiliano Campobello, native flute; Jayson Fann, world percussion; Marcie Chapa, world percussion; Shannon Delaney, violin 1; Amalia Diaz, violin 2; John Wineglass, viola; and Kristen Harris-Garbeff, cello.

Sponsored in part by Jeri Crawford, Steve Friedlander, Nicola Reilly, John Wineglass, and Dorothy Wise, with support from the Monterey Symphony Orchestra

**The fee of \$75 for this special event covers exhibit access, appetizers, drink tickets, and transportation to and from the hotel. Tickets may be purchased at the registration desk, subject to availability.*

FRIDAY, AUGUST 9

8:00 AM–5:00 PM

REGISTRATION/EXHIBITOR MARKETPLACE OPEN

Preconvene Area and Party Deck

9:00–10:30 AM

MORNING PLENARY:

The Next 50 Years: Envisioning Nonprofit and Arts Organizations of the Future by Vu Le

Laguna Grande C–G



In this sociopolitical climate, nonprofit organizations play a critical role. However, we face many challenges, including unrealistic expectations from society, funding challenges, comparisons to for-

profits, and our own scarcity mindset. Meanwhile, many of us are grasping with the question of what our roles are in light of changes in demographics and social consciousness on issues like race and equity. What does our sector look like in the next 50 years? What is the role of arts organization in the fight for social justice? How do we respect traditions while embracing changes? The future is bright and full of possibilities.

Vu Le, Executive Director, Rainier Valley Corps; Creator, NonprofitAF.com

Sponsored by The Alan and Susan Seidenfeld Charitable Trust and by Robert Swaney Consulting, Inc.

11:00 AM–12:15 PM

BREAKOUT SESSIONS

1 | **BOARD WORKSHOP PART 1: Enough Already...Get Your Board Running Efficiently and Effectively!** **BG**
Laguna Grande A

Does your board ever discuss raising more money but cannot seem to find the solution? Have you ever had long conversations about the challenges in the nonprofit community and how your symphony is perceived? Ever wonder how to create more accountability for performance? Achieving a highly effective board can often seem like a never-ending quest. While it is a journey, there are some definitive signposts along the way that can be of great help!

This session is open to board and staff members. Part 2 of this workshop is continued during the afternoon breakout sessions. Attending Part 2 is recommended but not required.

Dave Sternberg, Founding Partner, Loring, Sternberg & Associates; BoardSource Senior Governance Consultant; Author of Fearless Fundraising

Sponsored by Alan Mason, with support from Loring, Sternberg & Associates

2 | Composer Diversity in Practice and Programming AP DEI OA
Laguna Grande B

We've heard it a lot in this industry: we need to diversify. But how? Launched in 2018, the Composer Diversity Database was created as the only existing tool that allows you to search for works by underrepresented composers. The project is now housed at the State University of New York at Fredonia as a full institute, and the team has launched additional tools and research in order to track diversity progress in the field. Institute Founder and Director Rob Deemer will outline the tools, models, and best practices with which to explore new repertoire and engage in discussion with participants about how and why performers, presenters, educators, researchers, and orchestras of all sizes can and should

increase their programming of composers from underrepresented groups.

Rob Deemer, Founder and Director, Composer Diversity Project; Associate Professor and Head of Composition in the School of Music at the State University of New York at Fredonia

Sponsored by Julia Ward

3 | Making Waves by Making Your Case for Support DF
Del Monte/El Camino

Raise your hand if you want your organization to know the concrete steps your staff and board can take for a stronger campaign case. Many leaders wrongly believe that mission-based need alone will stoke donor support. But the most successful leaders know that their fundraising campaign will be most effective when their communications carefully balance the right mix of reason with emotion and urgency. This lively session features rich examples to help organizations up their fundraising campaign game—whether for capital, endowment, or annual fund—so that donors are both excited and engaged. Mission Minded Founding Partner Jennie Winton and Creative Director and Partner Rod Lemaire will share the secrets that Mission Minded has used to help countless organizations, including arts and culture nonprofits, successfully reach and exceed their campaign fundraising goals.

Rod Lemaire, Partner and Creative Director, Mission Minded

Jennie Winton, Founding Partner, Mission Minded

Sponsored by Bill and Nancy Doolittle

12:30–2:00 PM

NETWORKING LUNCH ON YOUR OWN

2:15–3:30 PM

BREAKOUT SESSIONS

1 | BOARD WORKSHOP PART 2: Taking the Board to the Next Level BG
Laguna Grande A

So, you have the right board members—now what? The right board members alone will not necessarily produce the best outcomes unless the board is thoughtful about how the work is organized! This session is open to board and staff members. Attending Part 1 of this workshop is recommended but not required.

Dave Sternberg, Founding Partner, Loring, Sternberg & Associates; BoardSource Senior Governance Consultant; Author of Fearless Fundraising

Sponsored by Alan Mason, with support from Loring, Sternberg & Associates

2 | To El Sistema or Not to El Sistema? How El Sistema Models Can Work For You EC
Laguna Grande B

Some orchestras have El Sistema; some don't. A few have a "Sistema-like" program, but don't call it that. So what are the pros and cons of such a program? Why is it trendy? And does it work? Whether you have an El Sistema program or not, this applicable workshop is designed to bring into focus your existing education work and/or help you build new meaningful education programs. You'll leave this session with an actionable plan on how to



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create an education model that meets the needs of your organization and your community.

Sunshine Deffner, Operations and Education Director, California Symphony

Katie Wyatt, Executive Director, ESUSA

Sponsored by Joanne Taylor Johnson

3 | Advocacy: How the Monterey Bay Aquarium Does It **EC MC OA** Del Monte/El Camino

Research shows that nonprofits who engage in advocacy have a higher impact than those who don't (Source: *Forces for Good*, Leslie Crutchfield). Case in point: the world-leading Monterey Bay Aquarium has a mission to inspire conservation of the ocean, but it does much more. It raises its voice and mobilizes its supporters and policymakers to take action for the ocean on issues ranging from offshore oil drilling to plastic pollution, climate change, and sustainable seafood. We'll explore the reason for shifting from awareness and education to advocacy and how the aquarium employs different approaches with different audiences to make a difference.

Kera Panni, Conservation and Science Outreach Manager, Monterey Bay Aquarium

Ken Peterson, Senior Communications Strategist, Monterey Bay Aquarium

Sponsored by Joe Truskot

3:45–5:00 PM

PEER FORUMS REDUX

All forums in Laguna Grande C–D except for Board Members and Managers with Budgets over \$1 Million (see below).

DF EC MC OA AP BG EP

Continue the conversations and sharing that you started with Thursday's peer forum sessions.

- **Development:** Scott Vandrick, Chief Development Officer, Pasadena Symphony and POPS

- **Education and Community Engagement:** Sunshine Deffner, Director of Operations and Education, California Symphony; Loribeth Gregory-Beck, Director of Education and Community Engagement, Santa Barbara Symphony
- **Marketing, Communications, and Audience Development:** Scott Seward, Director of Marketing and Communications, Carmel Bach Festival
- **Orchestra Operations:** Seth Ducey, Executive Director, Golden State Youth Orchestra
- **Artistic Leaders and Musicians:** Scott Seaton, Music Director, North State Symphony; John Wineglass, Composer, JW Productions LLC
- **Board Members (Laguna Grande G):** Mireya Asturias Jones, Volunteer, Los Angeles Philharmonic Affiliates; Dean McVay, Board President, San Bernardino Symphony
- **Managers with Budgets over \$1 Million (Peninsula Board Room):** Kathryn Martin, Leadership Transition Strategist/Executive Coach, Kathryn R. Martin Consulting
- **Managers with Budgets under \$1 Million:** Anne Viricel, Executive Director, San Bernardino Symphony
- **Emerging Leaders:** Caitlin Fillmore, Development and Special Events Coordinator, Monterey Symphony

Sponsored by Lee and Shirley Rosen

5:30–7:00 PM

PRESIDENT'S RECEPTION Seaside Ballroom

This reception is an opportunity for ACSO to thank our Individual Donors and Conference Sponsors at a gathering that includes drinks and light appetizers. Have a drink on us, network with one another, and know how much ACSO appreciates your support! This reception is open by invitation to our Conference Sponsors and individuals who have donated \$150 or more to ACSO in the past year. Donate at the registration desk or the door to secure your invitation!

8:00–10:00 PM

EMERGING PROFESSIONALS MIXER **EP**

Art Gallery and Photography Studio of Manny Espinoza, 613 Ortiz Ave, Ste B, Sand City

If you have been in the orchestra/classical music field for less than five years, come and network with your fellow emerging professionals. Create bonds of friendship that will last for the rest of your career! This reception will be held in the loft studio of local Monterey artist Manny Espinoza and will include complimentary wine, beer, and refreshments. Plus, you won't want to miss limited quantities of special nitrogen-infused margaritas provided by El Jefe Tequila. Take in Manny's photography, enjoy live music, and mingle with your ACSO colleagues as well as other emerging professionals from the Monterey Bay area. The reception is a half mile away from the conference hotel, which is a five-minute drive or a 15-minute walk.

Sponsored by Kathryn R. Martin, with support from Steve Friedlander and from the Monterey Symphony Orchestra

SATURDAY, AUGUST 10

8:00 AM–1:00 PM

REGISTRATION/EXHIBIT MARKETPLACE OPEN

Preconvene Area and Party Deck

9:00–10:30 AM

CLOSING PLENARY:

Powerful: Building A Culture of Freedom And Responsibility by Patty McCord

Laguna Grande C–D



When it comes to recruiting, motivating, and creating great teams, Patty McCord says most companies have it all wrong. McCord helped create the unique and high-performing culture at Netflix, where she was chief talent officer. In her new book, *Powerful: Building a Culture of Freedom and Responsibility*, she shares what she learned there and elsewhere in Silicon Valley, and why the applications aren't as different for orchestras as one might first think. McCord will discuss how building a culture of freedom and responsibility strips away the constraints that can thwart high performers so your teams can be lean, nimble, motivated, and happy.

Patty McCord, Principal, Patty McCord Consulting; Former Chief Talent Officer, Netflix

Patty's book, Powerful: Building a Culture of Freedom and Responsibility will be available for purchase onsite, and she will be signing copies immediately after her presentation.

Sponsored by Joyce Osborn and Dorothy Wise, in memory of Thomas Osborn, and by the Monterey Peninsula Foundation



Musical Moment provided by Youth Orchestra Salinas

11:00 AM–12:15 PM

BREAKOUT SESSIONS

1 | The Orchestra Gold Mine: Embracing and Working Through A Legacy Pipeline **DF** Laguna Grande A

Of all the ways to raise money, planned giving often gets short shrift, meaning less time and attention (if any) are given because a long-term strategy never seems to get the same urgency as today's deadline or on-fire project. But this is a particularly short-sighted and costly mistake for orchestras given our generally older, more affluent donor base. In other words, orchestras are sitting on a gold mine of legacy giving prospects, and focusing on it is one of the best things we can be doing for the future of our organizations. This session will share how to implement a three-step pipeline matrix to inspire donors to leave a legacy to your organization and how to develop the right legacy marketing materials and the KPIs that show results of your legacy program.

Ligia Peña, Head of Planned Giving, Greenpeace

Sponsored by Bruce Lindsey

2 | Help! I'm Working at A Great Orchestra But I Don't Know How To Get To The Next Step In My Career! **EP** Laguna Grande B

There are many paths to success. Our careers and lives are unique, and we all need help to navigate our individual journey and the changes along the way. Let's explore together some common questions: How do I develop my network? How do I build my resume? Do I need a Master's degree? What if I want to change direction? How and when do I broach the topic of a promotion? Whether you are early career, mid-career, or experienced but have questions, come

and hear from this panel of multi-generational leaders who have real stories that may help you find your path.

Anwar Nasir, Vice President of Marketing and Communications, Omaha Symphony

Alice Sauro, Executive Director, Sacramento Philharmonic and Opera

Elizabeth Shribman, Associate Director of Executive Operations, San Francisco Symphony

Sponsored by Sandie Borthwick and Gloria Souza

12:30–3:30 PM

POST-CONFERENCE MASTERCLASS:

Equity, Diversity, and Inclusion in Everyday Practice with Vu Le **DEI** Laguna Grande C–D

Workshop is not included in the general conference registration and has an additional fee of \$75, which includes a light buffet lunch.

DEI has been like coconut water—everyone's drinking it. But what does this look like in action? In this interactive workshop, we will distill theories and concepts into daily practices across different areas of work: fundraising, communications, board governance, community engagement, and organizational culture, with special focus on recruitment and hiring. Participants will leave with the beginning of a DEI plan and actions that they can implement at their organizations.

Vu Le, Executive Director, Rainier Valley Corps; Creator, NonprofitAF.com

Sponsored by The Alan and Susan Seidenfeld Charitable Trust

SPECIAL THANKS

Many thanks to our 2019 host, the Monterey Symphony.

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

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AWARDS TASK FORCE

Thanks to the following individuals for reviewing and selecting the winners of the Kris Sinclair Leadership Award and/or the MVP Awards.

Kathryn Martin
Dean McVay
Kris Sinclair
Amber Weber
Amy Williams

SUPPORTERS

Thanks to the following friends of ACSO who provided goods, services, and support for the 2019 Annual Conference.

Anne Bown-Crawford, Kristin Margolis, and the California Arts Council
Manny Espinoza
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Bruce Lindsey
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Thank you to the following individuals for becoming the inaugural donors to our Golden Anniversary Campaign. Their multiyear gifts will support ACSO's strategic priorities of growing ACSO's internal capacity, increasing awareness of the value of an ACSO membership, and enhancing opportunities for members to come together.

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We invite you to join this esteemed group of donors to build an even better future for the classical music field in California and the western region. Become a Golden Anniversary Donor today. Information is available or donations can be made at the registration desk.

50 YEARS | 1969–2019

THE JOY OF GIVING

ACSO would not have been able to produce this annual convening if not for the following individuals and organizations. Thank you!

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THERE'S A STORY BEHIND EVERY SUCCESS.

RESULTS MATTER and each RSC client has their own story, representing a journey to fundraising success.

Read more at RSCfundraising.com to learn how an RSC partnership makes the story better.

With RSC coaching, the **Amarillo Symphony** surpassed its Annual Fund goal and had a record-setting fundraising year – increasing contributed revenue by 174% in 2018. They are set to out-perform that goal in 2019.

Through an RSC partnership, the **Sacramento Philharmonic & Opera's** Annual Fund grew from just over \$400,000 in 2014 to now over \$1,100,000 in 2019. 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.

RSC counsel helped broaden **Huntsville Symphony Orchestra's** donor base by more than 50% and overall annual contributed revenue by 20% in 2018. They surpassed their 2019 Annual Fund goals with two months left in the season, and are on track for another record year for contributed revenue.

As part of a comprehensive campaign designed by RSC, the **Fort Wayne Philharmonic Orchestra** has surpassed its initial \$6,000,000 major gift goal, while simultaneously expanding the number of Annual Fund donors by 30%.

Working with RSC, **Marin Symphony** increased its total contributed revenue by 20% in 2019 year-to-date. Individual Giving and broad-base giving each increased by 20% year-to-date.



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1969–2019

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Here's to the next 50 years
of supporting and strengthening
California's classical music
organizations and advocates.



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Thank you to all the ACSO board members who have served over the last fifty years! Your leadership has established our association, built our network, and strengthened California's classical music landscape.

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 Carmen Dragon, 70-82

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Maya Rath, 07-18
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Joseph Truskot, 93-06, 97-99★+
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Adrienne Valencia, 08-18
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Scott Vandrick, 18-21
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Paul Jan Zdunek, 11-18

KEY:

- + Director Emeritus
- ◆ Founder or Founding Board
- ★ President

This information was compiled from our archives. If you would like to submit a correction, e-mail us at office@acso.org.

ANNIVERSARY TRIBUTES



On behalf of the **National Endowment for the Arts**, it is my pleasure to send this message of congratulations to help commemorate the 50th Anniversary of the Association of California Symphony Orchestras! This important occasion is made up of so many significant milestones along the way, from the very first gatherings of a handful of founders, to today with your full range of programs and services including annual conferences, symposiums for youth orchestras, an awards program, advocacy efforts, and much more.

An especially important part of your mission is all you do on behalf of smaller-budget professional orchestras and community orchestras, organizations that could be easily overlooked. And the increase in the breadth and depth of your work—from the initial group of 23 organizational members to over 130 today—is significant, including your consulting services grant program to help orchestras strengthen their strategic planning efforts, fundraising plans, audience development initiatives, and other key aspects of their operations.

As a former CEO of a national arts service organization, I know firsthand how valuable an organization like ACSO can be to your members, and I also know that maintaining a service organization can be as challenging as it is important. So my hat is off to all the former and current leaders of ACSO, and please keep up the good work.

Congratulations again to the entire ACSO family, and here's to the next fifty years!

Sincerely yours,

Ann Meier Baker
 Director of Music and Opera
 National Endowment for the Arts



The **California Arts Council** is proud to celebrate and support half a century in service to our state's classical music organizations by the Association of California Symphony Orchestras. As a longtime grantee with a shared vision of more vibrant, healthier communities through creative expression, the work of ACSO and the CAC have been interwoven since our agency's inception. We look forward to another 50 years of ACSO's leadership and legacy as a champion of music for all Californians.

Anne Bown-Crawford
 Executive Director
 California Arts Council



On behalf of the **League of American Orchestras** and its more than 2,000 organizational and individual members, I am pleased to congratulate ACSO as it celebrates 50 years of extraordinary service to California's orchestras.

As a grassroots organization ACSO has stayed close to its members' needs, from the tactical to the strategic. It exemplifies the power of collective action to mobilize in support of public policy while leveraging both the commonality and diversity of its membership to promote learning and field-building.

Staying in business for 50 years is an accomplishment for any business. But to grow in scope, scale and impact as ACSO, a nonprofit, has done is an extraordinary achievement. ACSO's board and staff leadership throughout has been inspired, disciplined, selfless, and steadfast. It has listened carefully to its members, large and small, and kept its sights fixed firmly on the future.

I have always admired ACSO for the strong sense of family it has instilled among its members and have tried to learn from that for our work at the League. ACSO and its members feel like one, and perhaps that is the greatest accomplishment for any association.

Happy Anniversary!

Jesse Rosen
 President and CEO
 League of American Orchestras



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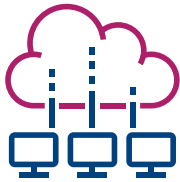
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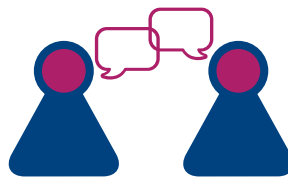
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