

NORTH CAROLINA SYMPHONY

EXECUTIVE OVERVIEW

Purpose

The mission of the North Carolina Symphony is to present an orchestra of the highest artistic standard that enriches, entertains, and educates diverse audiences in a variety of settings and represents North Carolina as a leader in performance and music education.

Formed in 1932 under the direction of Pulitzer Traveling Fellow Lamar Stringfield, the North Carolina Symphony served as a WPA project in the 1930s and then in the 1940s became the first orchestra to receive state funding on a continuous basis. Under the 33-year leadership of Dr. and Mrs. Benjamin Swalin, the Symphony began its grassroots emphasis of taking the orchestra to the people of the state. That tradition began in 1943 when the State Legislature passed the "Horn Tootin' Bill" and it continues today.

Artistic Leadership

Grant Llewellyn, Music Director

Music Director since 2004, Llewellyn was music director of the Handel & Haydn Society in Boston from 2000 to 2005 and appears frequently with the BBC National Orchestra of Wales and major orchestras across Europe and North America.

William Henry Curry, Resident Conductor

Curry also serves as artistic director for Summerfest, and has been on the conducting staff of the Symphony since 1995. He was named music director of the Durham Symphony in 2009.

Sarah Hicks, Associate Conductor

Also principal conductor of pops and presentations conductor at the Minnesota Orchestra, Hicks is in her third season with the Symphony.

Recent Achievements

- In June 2010, the Symphony performed for personnel from four of North Carolina's major military bases on its "**Red, White and Blue Tour.**" Conducted by music director Grant Llewellyn, the tour included on-base performances at Seymour Johnson Air Force Base, Cherry Point Marine Corps Air Station, and Fort Bragg, as well as a performance in downtown Jacksonville, NC for the Marine Corps community at Camp Lejeune. Lieutenant Governor Walter Dalton served as the narrator and host for the opening performance at Seymour Johnson AFB.
- In June 2010, performers from across the musical spectrum joined forces with saxophone superstar and Symphony Trustee **Branford Marsalis** to mount a special one-night-only benefit concert to support the Symphony's programs. The evening was hosted by Grant Llewellyn (who also played piano), and featured performers jazz pianist Joey Calderazzo, a string quartet made up of Symphony musicians, vocalist Tina Morris-Anderson, old-time string band Big Medicine, blues guitarist Scott Ainslie and blues harmonica player Phil Wiggins. All of the performance fees and related production costs were donated, and through contributions and ticket sales the event raised \$147,000.
- In October 2009, the Symphony released the second of two compact discs for **BIS Records** of Sweden. The disc features pianist Yevgeny Sudbin in a pair of piano concertos, Medtner's second and Rachmaninoff's fourth in its original 1926 edition. The first disc, *American Spectrum* featured Durham resident and

saxophone superstar Branford Marsalis and received international attention in publications ranging from *Gramophone* to *The Absolute Sound* and *Diverdi* to *International Record Review*. In addition, in January 2007 the Symphony recorded Stephen Jaffe's *Poetry of the Piedmont* and *Cut Time* for **Bridge Records**, released commercially in spring 2008. These are the Symphony's first commercial releases since 1987.

- In June 2009, the North Carolina Symphony performed with internationally-acclaimed **Bolshoi Ballet** as part of the Carolina Performing Arts Series in Chapel Hill. This was one of only three stops in the United States for the Bolshoi.
- In May 2009, the Symphony toured coastal North and South Carolina with "**BB&T Blue Skies and Golden Sands**," a presentation celebrating beach music and the history of coastal Carolina music. This tour followed the very successful 2007 "**Capital Bank Blue Skies and Red Earth**" tour which featured North Carolina's musical roots including Piedmont blues, ballads and gospel.
- In October 2008 the Symphony premiered Duke composer Stephen Jaffe's *Cithera mea (Evocations)*, a joint commission with the Nasher Museum of Art at Duke University, as part of their critically acclaimed *El Greco to Velazquez: Art During the Reign of Philip III* exhibition. The exhibition was mounted in only two U.S. cities – Boston (Boston's Museum of Fine Arts) and Durham.
- A **Shostakovich Festival** was held during the week of February 11-16, 2008, featuring performances of Shostakovich's *Hamlet*. The performances were conducted by John Mauceri, Chancellor of the UNC School of the Arts, and actors with ties to the school joined the orchestra on stage for a live, theatrical event. The festival also included a panel discussion with the conductor, director and actors; a pub concert of chamber music by Shostakovich and fellow Russian composer Sergei Prokofiev performed by Symphony members; and a screening of the original 1964 Kosintsev film version of *Hamlet*.
- Recent seasons included many artistic triumphs, including a semi-staged production of Mozart's *The Marriage of Figaro* (in collaboration with the Opera Company of North Carolina) and Handel's *Messiah*, both conducted by music director Grant Llewellyn, **Gerhardt Zimmermann's** final concert as conductor laureate in a performance of Mahler's Symphony No. 6, the Symphony's first-ever **Gospel Christmas Spectacular** conducted by resident conductor William Henry Curry. The Symphony also played with **Yo-Yo Ma, Bernadette Peters, Denyce Graves, Midori, Tift Merritt, and Elvis Costello**.
- The Symphony was awarded Raleigh's **Medal of Arts** for 2007 by the City of Raleigh Arts Commission on the occasion of the Commission's 20th anniversary and the Symphony's 75th.

Home Concert Venues

- **Meymandi Concert Hall** at the Progress Energy Center for the Performing Arts debuted in February, 2001 and plays host to the Symphony's classical, pops and young people's concert series in Raleigh. It is considered to be one of the finest performance venues in the country, with acoustics rivaling the finest concert halls in the world.
- The Town of Cary's **Koka Booth Amphitheatre at Regency Park** serves as the Symphony's summer home and boasts acoustics by Lawrence Kirkegaard's world-renowned firm and design by William Rawn, the architect of Ozawa Hall at Tanglewood in Lenox, Massachusetts.

Statewide Service and Education

- The North Carolina Symphony is the 31st largest orchestra organization in the country; however, it is singularly unique in two respects:
 - 1) its commitment to statewide service

2) its dedication to the musical education of North Carolina's school children

- Each season, the North Carolina Symphony performs approximately 175 full-orchestra concerts for adults and children across the state. **More than one-half of its performances take place outside the Triangle.** Each season, the Symphony visits between 30 and 40 counties across the state.

No other orchestra in America serves its state to the extent the North Carolina Symphony does, as the North Carolina Symphony performs far more educational performances outside its home-base community than any other orchestra.

The orchestra travels approximately 10,000 miles a season throughout the State of North Carolina and reaches nearly 250,000 people per year.

- The Symphony performs about **45 full-orchestra music education concerts** for school children throughout North Carolina each season. More than 50,000 school children are able to hear a live orchestral performance each year.
- A **weekly radio broadcast series** with listener-supported North Carolina Public Radio WUNC-FM brings full concert-length concert programs to the public over the airwaves from June -August. Hosted by nationally recognized broadcaster David Hartman (of *Good Morning America* fame), the broadcast series reaches audiences across much of NC.
- Many statewide concerts are organized via **chapters**, hub series or professional presenters. Chapters function as auxiliary extensions of the Symphony where volunteers in a specific community sell tickets and raise funds to bring the Symphony for an evening and/or education concert. Hub series communities feature three or more evening concerts; they may or may not have an organized team of volunteers to help promote the series. Presenters (typically a nonprofit organization such as a university presenting series, concert series or community college) purchase a performance of the Symphony on contract for an agreed upon fee. They are responsible for marketing and promoting the concert.

Program Summary

The Symphony's annual program offerings are diverse, with the following major categories:

- **Duke Medicine Classical Series, Fidelity Investments Pops Series, Young People's Concerts and Friday Favorites Matinees** at Meymandi Concert Hall in Raleigh
- **Summerfest:** outdoor concerts at Cary's Koka Booth Amphitheatre at Regency Park
- **Regional Hub Series:** subscription series in Chapel Hill, Fayetteville, New Bern, Southern Pines and Wilmington
- **New Year's Eve Gala, Nutcracker and other special events**

The orchestra's educational and community engagement offerings are vast. In fact, the North Carolina Symphony has the most extensive music education program of any major U.S. orchestra. The following summarizes some of the major educational and community engagement annual offerings of the Symphony:

- **Education Concerts:** approximately 45 full-orchestra concerts given annually to school children (to audiences of mostly third through fifth graders) enhanced by extensive curriculum development, an annual workshop for teachers and online resources
- **Fidelity FutureStage:** in-depth learning and musical experiences for four selected elementary schools preparing and inspiring underserved students
- **Ensembles in the Schools:** intimate school-based learning experiences
- **Pre-Concert Talks and Meet the Artists:** held prior to classical concerts in the Triangle
- **Instrument Zoos:** held prior to summer, young people's, and some other concerts

- **Kathleen Price and Joseph M. Bryan Youth Concerto Competition:** held annually for ten to twenty-one-year olds
- **Manning Chamber Music Series:** in partnership with Peace College
- **Open Rehearsals:** daytime classical rehearsals open as a benefit to donors
- **Maxine Swalin and Jackson Parkhurst Awards:** for outstanding music educators
- **Young Strings of the Triangle:** free string instrument lessons to minority and/or economically disadvantaged students
- **Community College Residencies:** short-term programs for soloists and small ensembles for broad audiences in small and rural communities.
- **Youth Sinfonietta:** in its first season in 2009-10, a handpicked chamber orchestra of extremely talented high school students to be led by music director Grant Llewellyn

Revenue and Budget

The Symphony received \$2.65 million in annual funding through the North Carolina Department of Cultural Resources (DCR) and a \$1.5 million challenge grant from the State of North Carolina toward the Symphony's total 2009-10 operating expense budget of \$11.4 million. Overall revenue sources for the Symphony are (all figures are preliminary and unaudited for the fiscal year ended June 30, 2010):

Ticket sales and performance fees	\$3,272,335	(25.9% of revenue)
Private contributions	\$4,118,271	(32.6%)
State of North Carolina	\$4,148,466	(32.8%)
Other public grants	\$295,358	(2.3%)
Investment income from endowment	\$368,855	(2.9%)
In-kind support and services	\$436,852	(3.5%)
Total revenue	\$12,638,160	

The majority of the Symphony's expenses are fixed payroll and benefits, with musician salaries and expenses governed by a collective bargaining agreement between the Symphony and Local 500 of the American Federation of Musicians. The State grant-in-aid is spent exclusively on Symphony musicians salaries and benefits.

Musicians	\$5,373,315	(47.2% of expense)
Guest artists and other music expense	\$1,917,474	(16.8%)
Concert production and conductors	\$971,586	(8.5%)
Marketing	\$739,219	(6.5%)
Development	\$798,378	(7.0%)
Administration and other	\$1,592,600	(14%)
Total expense	\$11,392,571	

The Symphony's FY2010 operating result of positive \$1.25 million reduced its cumulative deficit to \$1.28 million. In the spring and summer of 2009, the Symphony made significant changes to its operating plan going forward, and successfully reduced its spending plan for 2009-10 to \$11.4 million (compared to an original budget of \$14.1 million for 2008-09). These expense reductions included postponing major projects, postponing the appearances of several guest artists and conductors, and reducing compensation across the entire organization, including staff, conductors, and orchestra.

Administrative Structure

Under the overall direction and leadership of Sandi Macdonald, President & CEO, the Symphony is managed by a team of thirty-five, organized into four departments, each with a corresponding vice president:

Artistic Operations (Scott Freck, *vice president*) oversees the breadth and ensures the quality of the organization's programs including programming, concert operations, artistic administration and education by overseeing strategic program development; planning programs and artists; negotiating labor and guest artist contracts; and overseeing concert production, orchestra personnel, conductors, library, travel, statewide touring, and music education.

Finance and Administration (Rob Schiller, *vice president*) ensures proper, effective and accountable fiscal management; develops budgets; monitors revenues, expenses and cash flow; creates financial reports and projections; manages the organization's financial resources; and manages the organization's human and data resources, information technology, grants administration, and investments.

Marketing and Audience Development includes all marketing functions for the orchestra, including new audience acquisition, sales, direct mail, advertising, e-commerce, volunteer engagement, communications, media relations, and public relations.

Philanthropy (Mary McFadden Lawson, *vice president*) secures charitable investments to support and sustain the organization, including relationships with individuals, corporations, and foundations. This includes annual, capital, endowment, and planned giving, sponsorship, and donor events.

Boards of Trustees

There are two boards associated with the Symphony. The **North Carolina Symphony Society** has a 60-person Board of Trustees comprised of:

- The Governor
- The Superintendent of Public Instruction
- The Secretary of the Department of Cultural Resources
- The President of the North Carolina Symphony League
- Four (4) members appointed by the Governor
- Four (4) members selected from among current Presidents of chapter boards
- Forty-five (45) members elected by the membership of the Society

The Society Board of Trustees serves as the governing body of the North Carolina Symphony Society, Inc., determines the organization's mission and purpose; secures the financial resources to support the organization; approves and monitors the organization's program goals; engages in strategic planning; and reviews and approves the annual budget. The Board of Trustees also selects and supports the President & CEO who in turn is charged with oversight of the Society's affairs. The President & CEO also informally functions as a Division Director within the Department of Cultural Resources.

The **North Carolina Symphony Foundation** has a separately incorporated Board of Trustees of 18 members. The Foundation Board of Trustees holds and manages the Symphony's endowment (\$7.3 million at July 31, 2010), solicits additions to the endowment, safeguards assets in a manner consistent with prudent investment of endowment funds, and expends endowment income and capital for the exclusive benefit of the Symphony Society. The current spending rule is 4.5% of a rolling twelve-quarter average of asset market value.