

Tracking Our Progress: FY18

Measuring the Success of *Connecting our Community and Shaping the Future of Opera* Strategic Plan FY15 – FY20

Strategic Plan Priorities:

One: Artistic Leadership

Build on Opera Theatre's standing as one of the most successful of all the festival opera companies, recognized as an artistic innovator and a leading destination for both established and emerging talent.

Two: Engagement & Experience

Create broader civic impact and a deepened sense of community engagement, ensuring that Opera Theatre is valued as integral to St. Louis.

Three: Human Resources, Infrastructure, & Technology

Create a theater experience that fulfills expectations for a leading arts institution. Make sure we have the technical and human resources needed.

Four: Capital Structure & Financial Strength

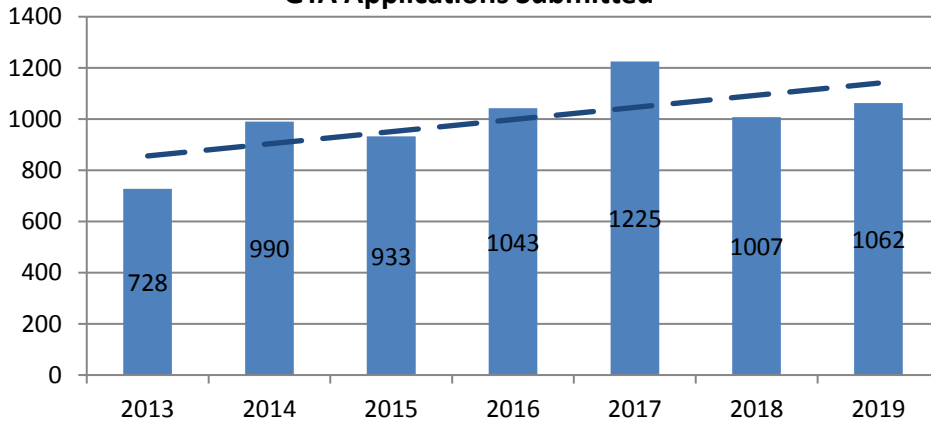
Realize an operating model that supports flexibility, liquidity, cash flow security, and endowment funds sufficient to ensure that we remain among the leading festival opera companies in the world.

Priority One: Artistic Leadership

Young Artist Programs

Opera Theatre's Young Artist Programs continue to impact the careers of young singers, create future stars, and establish OTSL as a leader in the artistic community. The number of young singers who apply to audition for our young artist programs, the level of focused training they receive as part of the program in the form of coachings and master classes, and the success of the *Center Stage* concert are all indicators of the success of these programs.

GYA Applications Submitted



Applicants and Auditions

In 2018, **1,062 young singers applied** to participate in next year's Gerdine Young Artist Program, representing a **45.9% increase** since 2013.

Although there is a natural fluctuation in the number of applicants year to year (often based on the repertoire and what roles it will offer for young artists), **since the *Center Stage* concert was added in 2015, the GYA program has consistently had more than 1,000 applicants each year.**

A Unique Experience for Artists



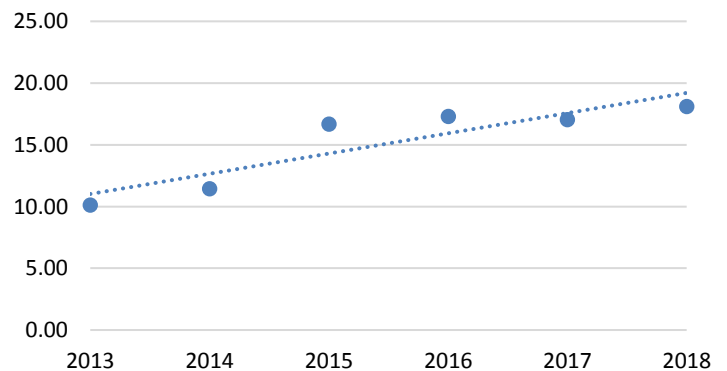
About her time in the 2018 *Gerdine Young Artist Program*, soprano Briana Hunter wrote:

"I have seldom experienced the level of care and familial spirit at a company as I have at Opera Theatre of Saint Louis. We as artists felt valued and cared for, and in turn, I believe gave our very best performances. In all of my years as an operatic nomad, I am used to growing accustomed to a place and then having to leave, however leaving St. Louis brought tears to my eyes. I truly felt so loved, so at home, and so extremely energized and inspired as an artist. I know it's not goodbye, only until next time."

Young Artist Coachings

With the addition of the *Center Stage* concert and additional coaching staff, Opera Theatre has continued to advance its mission of investing in young artists. The *Gerdine Young Artist* and *Gaddes Festival Artist* programs have continued to build the training and personal attention young singers receive from Opera Theatre's music staff. **The average number of coachings per singer has increased 79% since 2013, with each young artist receiving, on average, at least 18 coachings per season, as compared to 10 coachings in 2013.**

Average # Coachings per GYA



John D. Levy Master Classes

27 out of 30
young artists
participated in a Master Class during the
2018 Festival Season.

Avg # Coachings per singer	10.11	11.44	16.67	17.31	17.03	18.1
# GYAs/GFAs	35	36	33	39	35	30
Total # Coachings	354	412	550	675	596	543

Stars Return

The 2018 Festival Season marked the return of several major operatic stars who began their careers at Opera Theatre, including:

Ron Raines

OTSL Debut: 1976 - Dr. Malatesta, *Don Pasquale*
2018 Role: Oscar Hubbard, *Regina*

Susan Graham

OTSL Debut: 1988 - Erika, *Vanessa*
2018 Role: Regina Giddens, *Regina*

Patricia Racette

OTSL Debut: 1993 - Donna Elvira, *Don Giovanni*
2018 Role: Stage Director, *La traviata*

Jennifer Johnson Cano

OTSL Debut: 2006 – 3rd Graduate, *Street Scene* / 2008 – Nicklausse, *Tales of Hoffmann*
2018 Role: Orfeo, *Orfeo & Euridice*

Why do so many stars return to Opera Theatre?

In their own words:



“This is the 30th anniversary of my debut [at Opera Theatre] in *Vanessa*, and I returned the following year to sing my first Charlotte in *Werther*... Almost every American singer has a history there. It’s a place well known for giving young singers a start...”

– Susan Graham
(from *Opera Magazine*, April 2018)



“I am struck by how meaningful it is to come home to Opera Theatre, a company and community firmly rooted in their commitment to nurturing young talent. My journey in music would not have been possible without the opportunities provided by the Opera Theatre family. I know, first hand, it is through generous donations and the hard work of innumerable individuals that these life-changing experiences come to fruition.”

– Jennifer Johnson Cano



“My career as a singer has taken me to amazing opera houses all over the world, but when James Robinson asked me to come to St. Louis to direct the 2018 production of *La traviata*, I knew this was the place I wanted to make my directorial debut.”

- Patricia Racette

Emerson Behind the Curtain & Browning Technical Fellowships

Each year, the *Emerson Behind the Curtain* and Browning Technical Fellowship programs continue to train and develop the next generation of technical artists. Many recent graduates of the programs are continuing to develop careers in the field, and often return to OTSL in promoted positions.

Roger Chapman (*Emerson Behind the Curtain* graduate)

"My time in the *Emerson* program helped to build a deeper understanding of how an opera company works at an early stage of my career. That foundation has led me through positions at companies including Opera Theatre of Saint Louis, West Edge Opera, San Francisco Opera, and most recently The Houston Grand Opera as an Assistant Technical Director."

Morgan Fischer (*Emerson Behind the Curtain* graduate, *Browning Technical Fellow*, and *Browning scholarship recipient*)

"I'm currently working as the Production Manager and Front of House Manager at Mustard Seed Theatre in St. Louis. I am also pursuing my graduate degree in Arts Management. The generosity of the Browning family has allowed me the flexibility to continue working in the arts while also aiding me in the pursuit of my studies."



Tyler Arnold (*Emerson Behind the Curtain* graduate)

"The *Emerson* experience allowed me to be in the room with the Opera's amazing designers, such as Isaac Mizrahi, and this to receive some insight from an experienced professional in my field. I'm currently the Costume Fellow for the 2018/19 season at Playwrights Horizons, NYC."

OTSL on the National Stage

Opera Theatre continues to grow its presence on the national stage throughout the year.

In 2018, Opera Theatre hosted its 6th annual

National Press Luncheon
in New York City, with

13 national media outlets
in attendance.

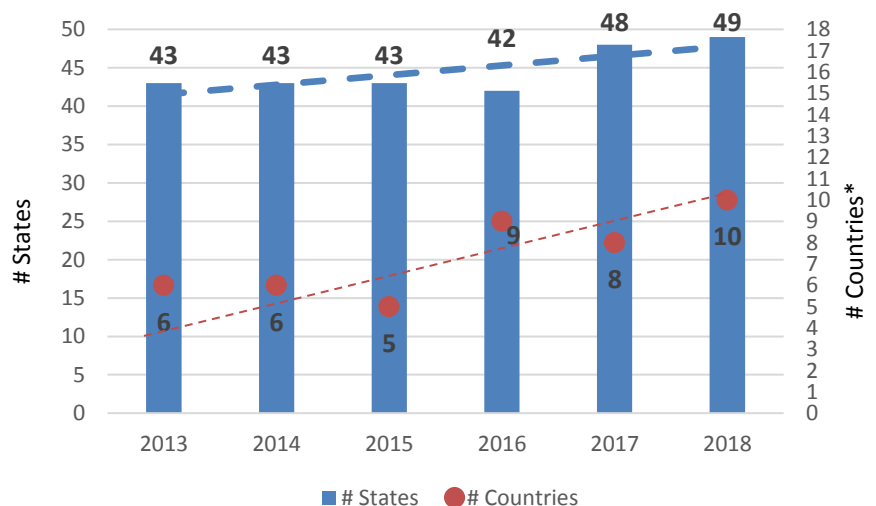
In March 2018, Opera Theatre's world premiere, *An American Soldier* was featured as part of the

Guggenheim Museum's "Works & Process" series
in New York City.

This series explores artistic creations through conversation with the creators and performances of the new works.

Audiences Traveling to Attend

In addition to attracting audiences from every zip code in the St. Louis metropolitan area, OTSL's season attracts audiences from around the US and beyond. **In 2018, we reached our highest "state count" in one season, with ticket buyers from 49 states.**



*The country count in each year does not include students from the AFS foreign exchange student program. In 2018, these students represented 7 additional countries, bringing the total countries represented to 17.

National Press Coverage

As part of a benchmarking study for the strategic planning process, OPERA America tracked which of the following national publications covered OTSL each season. **The results show that increased coverage corresponds with seasons in which OTSL presents a world premiere (as in 2013, 2014, 2016, and 2018).**

	2012	2013	2014	2015	2016	2017	2018
New York Times		X	X		X		X
Financial Times	X	X	X		X		X
Wall Street Journal	X	X	X	X	X	X	X
Washington Post		X	X			X	X
Chicago Tribune	X	X	X	X	X	X	
LA Times			X				
Opera News	X	X	X	X	X	X	X
Opera Magazine	X	X	X	X	X	X	X

In *The New York Times*

In 2018,
Opera Theatre was
featured in
5 separate
New York Times
articles.

2018 Quotations in the Press

“When you want to find out where opera is going in America, look to St. Louis.”

Steve Callahan, Broadway World – May 22, 2018

“There’s no opera company quite like Opera Theatre of Saint Louis.”

Scott Cantrell, Dallas Morning News – June 14, 2018

“An exceptional cast... fiercely dramatic singing.”

Anthony Tommasini on REGINA, The New York Times – June 2018

“The casting is luxurious... a powerful emotional arc.”

Joshua Barone on REGINA, The New York Times – June 2018

“An unqualified success... as perfect as could be.”

Santosh Venkataraman on REGINA, Operawire – June 2018

“Powerful... haunting music... evocative... both beautiful and full of raw feeling.”

Heidi Waleson on AN AMERICAN SOLDIER, The Wall Street Journal – June 2018

“With its new take on Verdi’s *La Traviata*... the company got it right.”

Sarah Bryan Miller on LA TRAVIATA, St. Louis Post Dispatch – May 2018

“OTSL’s production has five bright stars.”

Eric A. Gordon on LA TRAVIATA, The People’s World – June 2018

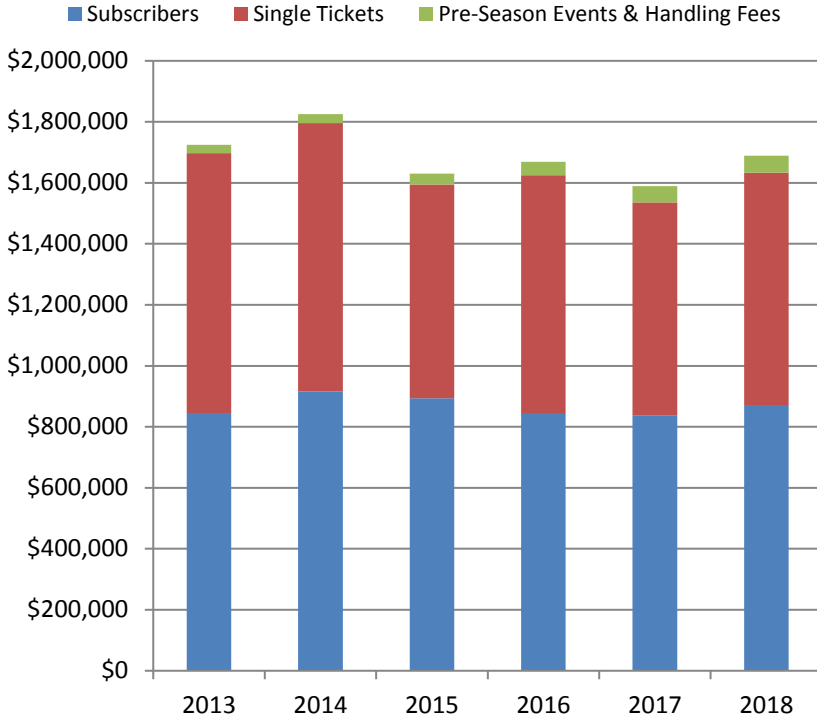
“Opera Theatre of Saint Louis scores another success with this refreshing and intoxicating interpretation.”

Mark Bretz on ORFEO & EURIDICE, Ladue News – June 2018

Priority Two: Engagement & Experience

Overall ticket sales revenue for 2018 reached **\$1,689,339**, or **104% of the budgeted goal**. This represents the highest ticket sales revenue since 2014. The 2018 average ticket price was significantly higher than recent years, at \$78.50.

Total Ticket Revenue



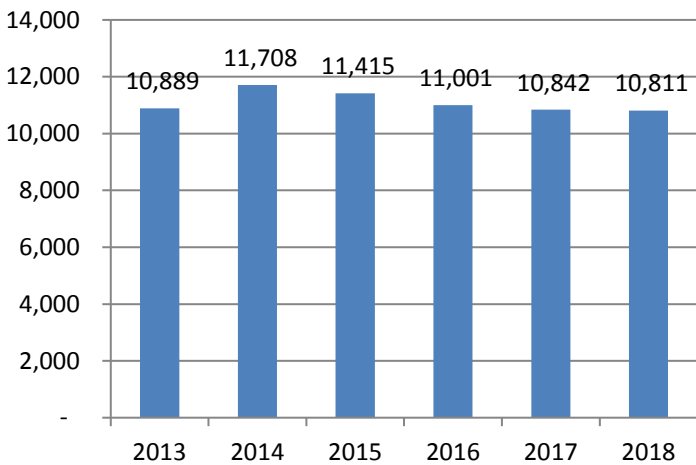
	2013	2014	2015	2016	2017	2018
Subs.	\$844,730	\$915,346	\$893,126	\$842,009	\$838,231	\$871,170
Single Tkts	\$852,245	\$880,061	\$701,312	\$782,635	\$696,955	\$761,871
Pre-Season & Handling Fees	\$27,426	\$29,574	\$35,324	\$44,633	\$53,872	\$56,298
Total \$	\$1,724,401	\$1,824,981	\$1,629,762	\$1,669,277	\$1,589,058	\$1,689,339

Total Tickets



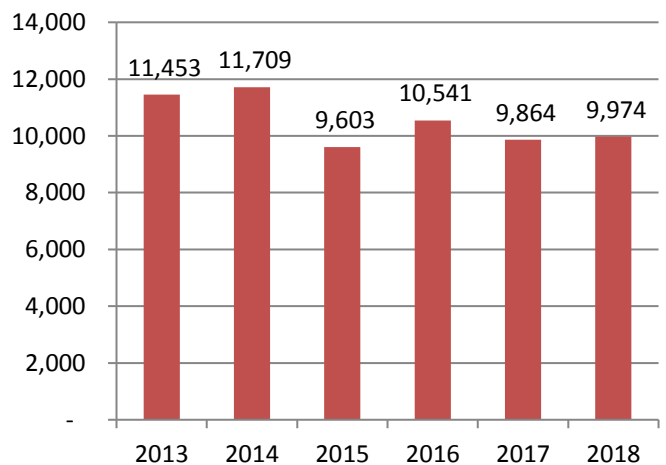
Total Tickets	22,342	23,417	21,018	21,542	20,706	20,785
Avg. Price	\$75.95	\$76.63	\$75.85	\$75.40	\$74.01	\$78.50
% New-to-file HH (of total tickets)	28%	26%	26%	26%	28%	26%

Subscription Tickets



Renewal Rate	81.9%	89.2%	86.0%	86.4%	85.7%	85.6%

Single Tickets

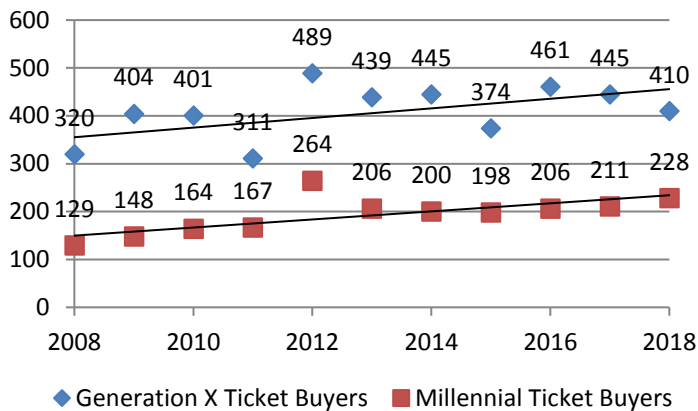


Building the Future Audience

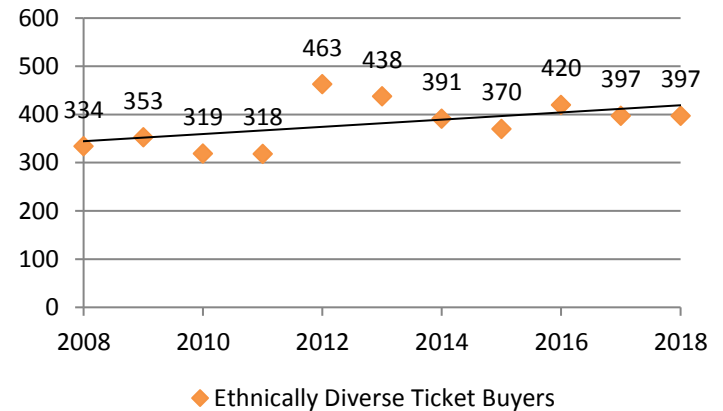
As one of 26 US arts organizations participating in The Wallace Foundation’s *Building Audiences for Sustainability* grant program, Opera Theatre has had the ability to conduct in-depth research on the demographics of our audience. As a result, OTSL has implemented strategies to build its audience, focusing on younger, more diverse patrons.

As demonstrated below, these strategies have been increasing audiences within these categories, especially since the creation of Opera Theatre’s “Engagement and Inclusion Task Force” in 2012.

Generation X & Millennial Ticket Buyers



Ethnically Diverse Ticket Buyers



**Data reflects 2018 analysis by JCA Arts Marketing.*

Historical data may vary depending on methodology of counting ticket purchases by OTSL staff and company members.

Designing the Best Customer Experience

In 2018, more than 700 opera creators, administrators, board members, and volunteers visited St. Louis as Opera Theatre hosted the annual OPERA America Conference in June.

Among the many ways in which Opera Theatre shined during the conference was showcasing our exemplary customer service. Opera Theatre’s Box Office and Front of House staff have continued to design and develop an unmatched level of positive customer experience, ensuring patrons enjoy their time at OTSL from ticket purchase, to pre-show picnic, performance, and after-party in the tent.

In order to ensure this level of customer experience is created company-wide, the front of house team participates in many in-depth trainings and development activities.

The unmatched dedication and team environment that is created allows the front of house staff to jump to the ready to serve patrons in all ways, including keeping them dry even in torrential storms!



Monsanto Artists-in-Training

During the 2018 Festival Season, Opera Theatre was thrilled to welcome back three former *Monsanto Artists-in-Training* (AIT) students as singers featured on the mainstage:



International and Metropolitan Opera star **Jennifer Johnson Cano**, who returned as Orfeo in *Orfeo & Euridice* is a former *AIT Spring Training* participant.



2018 Gerdine Young Artist **Michaela Wolz** was a 2012-2013 participant in the *Monsanto AIT Program*, winning the Maritz First Prize Award in 2013.



Chaz' men Williams-Ali was featured this season as a Richard Gaddess Festival Artist, performing the role of Jazz in the company's production of *Regina*. Chaz has a long connection with Opera Theatre. As a 3rd grader, he first experienced opera through a *Music! Words! Opera!* production at his school. He then went on to OTSL's *Monsanto Artist-in-Training Program* in 2005-2007.

Since his time as an AIT student, Williams-Ali has gone on to perform at The Glimmerglass Festival and the Washington National Opera. He recently performed Ferrando in Mozart's *Così fan tutte* in Milan, Italy as his international debut. During the upcoming season, he will perform the role of Robbins in Gershwin's *Porgy and Bess* at the English National Opera.

AIT's top scholarship recipient at the 2018 Spring Recital is already doing great things! **Monsanto Prize winner Miles Wadlington** worked as a camp instructor at OTSL's *Opera Camp for Kids* and performed as a supernumerary in *An American Soldier*. In September, he was featured at the *Arts & Faith St. Louis Interfaith Concert* where he sang the *National Anthem*. Miles will continue his vocal training as he begins as a freshman at Southern Illinois University-Edwardsville under the tutelage of acclaimed teacher Dr. Marc Schapman.



AIT College Tour

In 2018, 12 students from the *Monsanto AIT Program* were able to go on a college tour, visiting the campuses of Murray State University, University of Kentucky, Belmont University, and Vanderbilt University. This experience allowed them to tour the campuses, meet with faculty and staff at the schools, learn about the admission process, and participate in master classes with voice instructors from the universities. This event reinforces the program's goal of encouraging students to attend college.



From *AIT College Tour Video*:

"Opera Theatre has actually helped me find out what I want to go to college for, which is vocal performance and performing opera music – classical and contemporary music."

- Isaac Williams,
2017-2018 AIT Student

Teacher Mentoring Program

Opera Theatre's new **Arts Connection Task Force**, led by board member Edes Gilbert and soprano Christine Brewer, launched its inaugural Teacher Mentoring Program in June. Designed to help decrease the number of new teachers who leave the field within the first 5 years, the program pairs a new teacher with a mentor who has retired after a successful career of teaching music.

In the program's inaugural year, there are three mentors paired with teachers from the Normandy, St. Louis Public Schools, and St. Louis archdiocesan School districts. The participants attended OTSL's *Music! Words! Opera!* Teachers' Workshop in June and will continue to work together throughout the 2018-2019 school year.

Priority Three: Human Resources, Infrastructure, & Technology

Addition and Promotion of Staff

In 2018, two of Opera Theatre’s staff members were internally promoted to new positions. These new positions reflect their increased skills and responsibilities.

Anh Le

Assistant Director of Marketing
Promoted from Publication and Brand Manager position

Kait Neel

Manager of Donor Communications
Promoted from Development Associate position

Mia DeJong

Manager of Education & Community Engagement
Promoted from Education Coordinator position

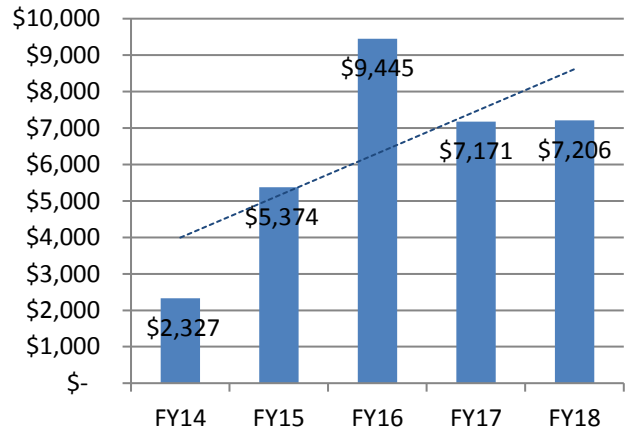
In order to support the growing administrative and programmatic needs of the company, a **new position was added in the Development Department** and the **Finance Department** was restructured to **add additional bandwidth** for the department through part-time positions.

Professional Development

The use of professional development funds has grown by approximately 310% since the fund was created in FY14*.

Staff utilized these funds to develop skills by attending conferences, tradeshow, taking courses, and attending workshops.

Total Dollars Used

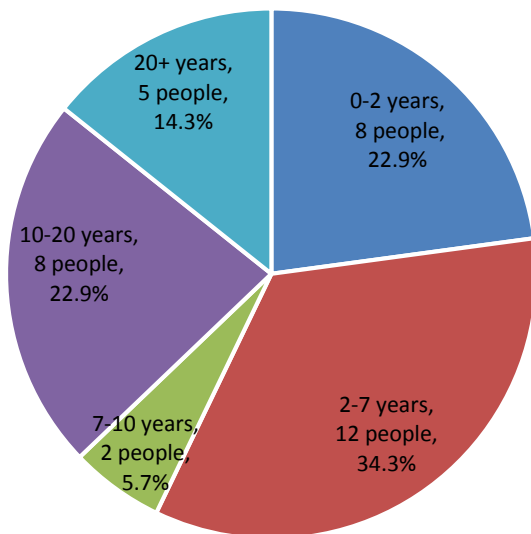


*Opera Theatre budgets \$200 per annual staff member each year for routine training programs. In addition, OTSL has a special allocation each year for staff professional development that is “above and beyond” required training. Employees are given the opportunity to apply for the use of these funds.

Staff Tenures

As the company undergoes a transition in leadership, the skills, expertise, and history of the OTSL annual staff remain one of its strengths. The current OTSL annual staff represents a healthy mix of consistency and institutional knowledge in those with long tenures, with the new ideas and fresh perspectives of those newer to the company and field.

OTSL Annual Staff Tenures



Production Crews

Each season, the production department grows from **7 full time annual staff members to more than 100 seasonal staff**. Included in that number are approximately 40 college students hired to run the shows alongside 13 union stage hands.

These 100+ company members work to create, locally, the sets, costumes, and props for the Festival Season productions.

In 2018, the costume shop created:

351 costumes

La traviata: 70

Regina: 53

An American Soldier: 85

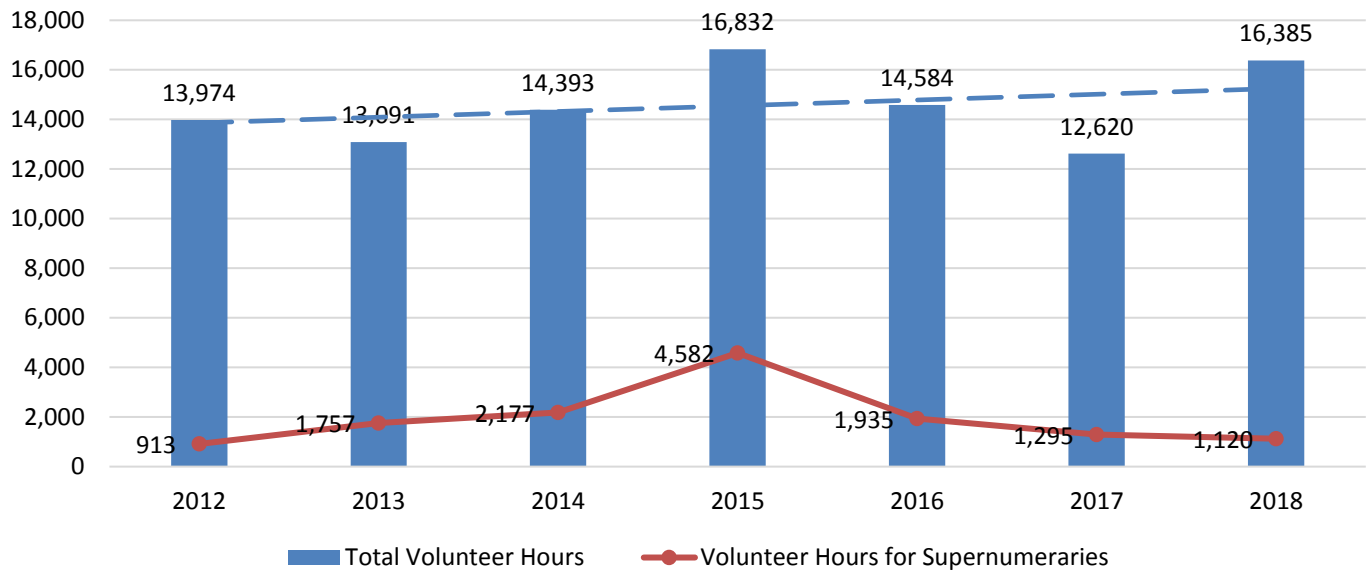
Orfeo & Euridice: 143

Volunteers

The Opera Theatre of Saint Louis Guild is vital to the success of the company. Approximately 300 volunteers serve on more than 25 committees each year to support OTSL's mission. **In 2018, these volunteers donated 16,385 hours of their time, along with their skills, expertise, and passion.**

Although there is a natural fluctuation in the number of hours each year, based on the activities of the company, the Guild consistently provides thousands of hours of work. In fact, one of the largest swings is due to the varying performance and rehearsal demands of the supernumeraries, who appear onstage in non-singing roles as part of the Festival Season productions.

Annual Volunteer Hours

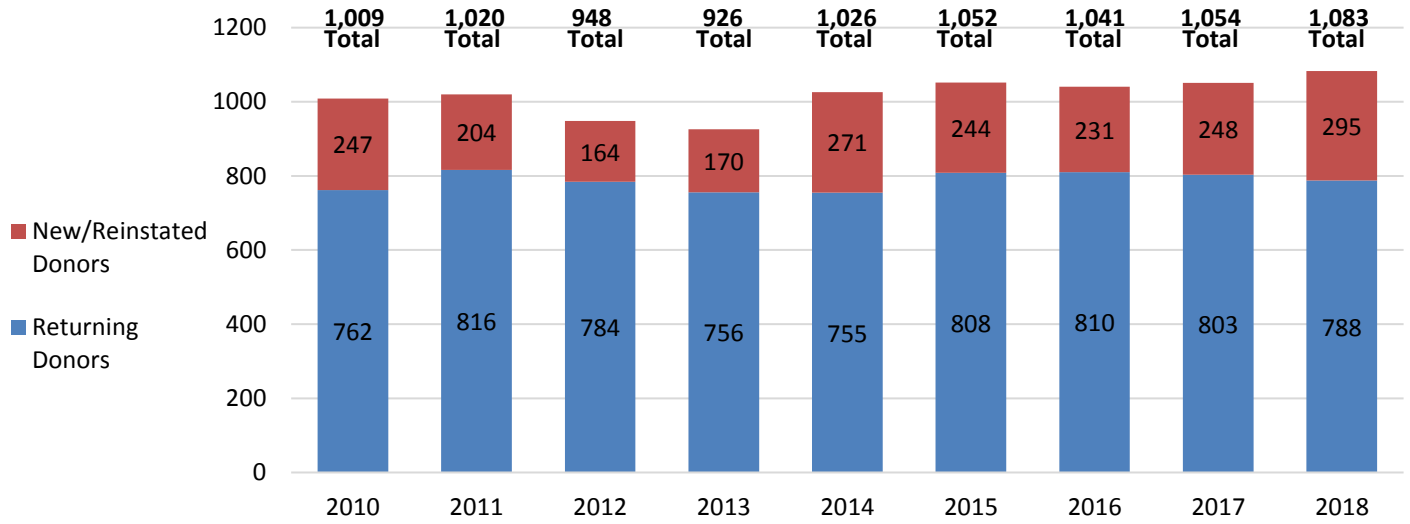


Priority Four: Capital Structure and Financial Strength

Total Annual Fund Donors (Individuals)

The total number of donor households increased by 3% from FY17 to FY18, and has grown by 7% since 2010.

OTSL's membership renewal rate was 79% in FY18; nationally, the nonprofit donor retention rate averages 45.5%.



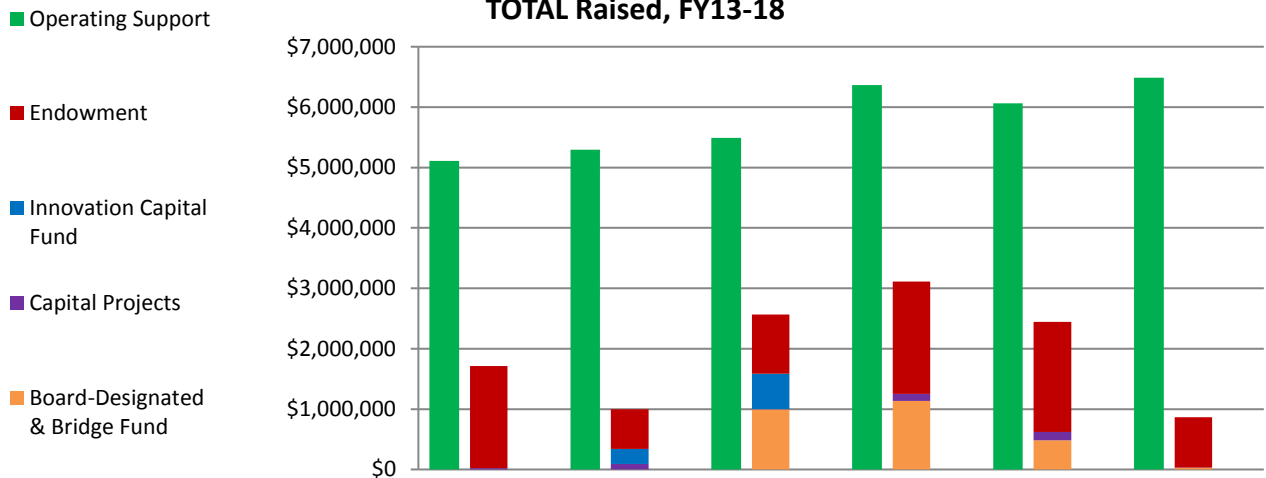
% Total Returning	76%	80%	83%	82%	74%	77%	78%	75%	73%
% Total New/Reinstated	24%	20%	17%	18%	26%	23%	22%	24%	27%
% Membership Renewal	74%	81%	77%	80%	82%	79%	81%	80%	79%

Total Fundraising – Annual Fund + Campaign

Total contributions to Opera Theatre (including operating, endowment, and capital support) exceeded \$7.3 million in FY18.

Operating support continues to grow, while endowment and capital support is more variable. OTSL's focus in FY18 was on operating support, because that was the company's greatest need.

**OTSL Contributed Revenue by Fiscal Year -
TOTAL Raised, FY13-18**



	FY13	FY14	FY15	FY16	FY17	FY18
Cost per \$ raised	\$0.10	\$0.12	\$0.11	\$0.12	\$0.11	\$0.14

Opera Theatre's cost per dollar raised went up slightly in FY18 due to personnel changes in the development department and the addition of a new position, but still remains consistently low compared to other organizations.

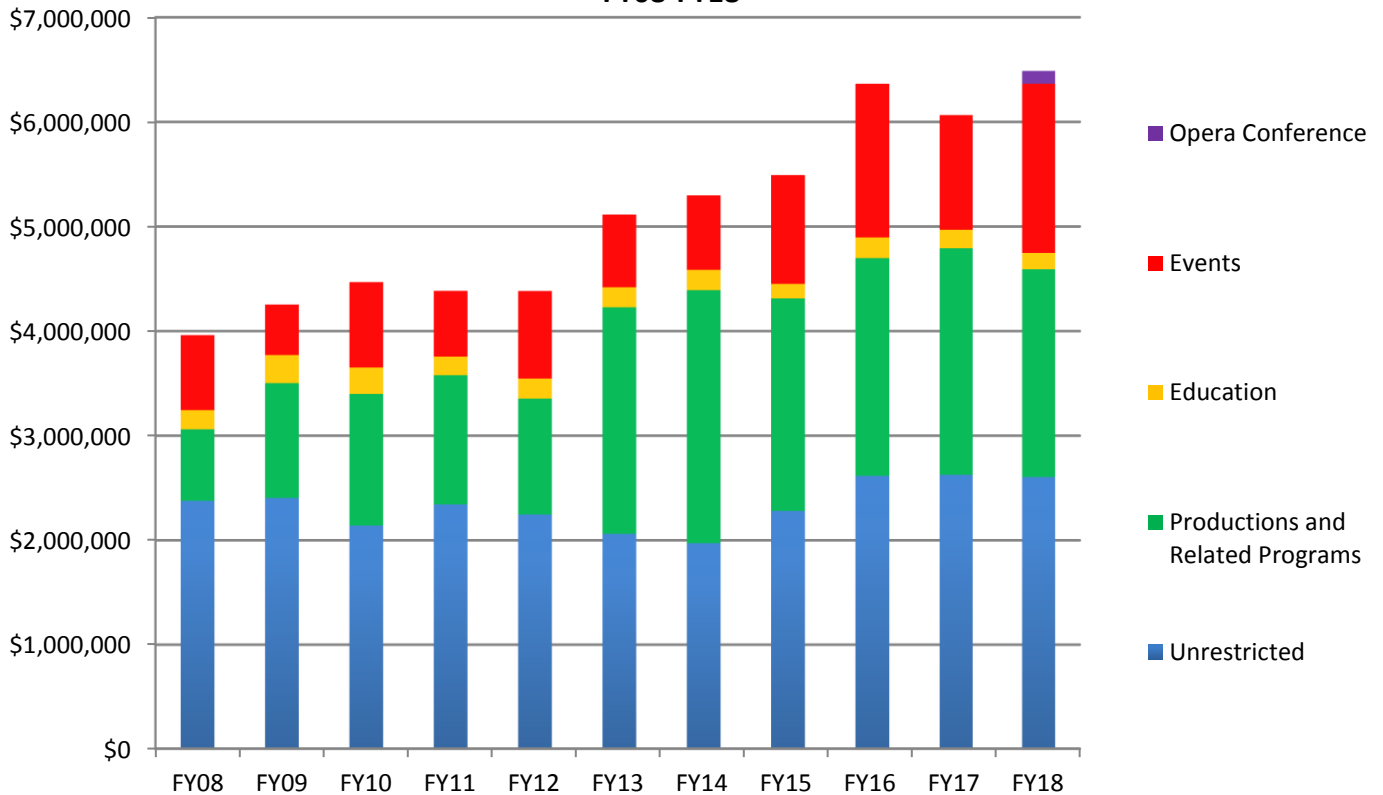
Total Annual Operating Support by Fund

Opera Theatre's board and staff collaborated to achieve **107% of the FY18 contributed revenue goal, raising a record-breaking \$6.4 million.**

Contributed revenue increased by 7% from FY17 to FY18, and has grown by more than 60% since 2008.

OTSL Contributed Revenue by Fund

FY08-FY18



*Totals reflect operating support (endowment and capital gifts are not included).

Ferring Challenge

Thanks to the generosity of Alison & John Ferring, the Ferring Challenge was launched to raise \$300,000 in new and increased gifts during Opera Theatre's Fiscal Years 2016-18.

The challenge was a resounding success, reaching

283% of the goal

with

1,400

new and increased gifts
totaling

\$848,022

Ticket Buyers as Donors

In 2018, 21% of all regular season ticket buyers also donated to OTSL.

Ticket Buyers as Donors



Building on Excellence Campaign

Through the strategic planning process and subsequent discussions of fundraising needs, OTSL has expanded the goal of the *Building on Excellence Campaign* from its original \$11 million to \$23 million.

**Total dollars raised for the
Building on Excellence Campaign,
as of September 30, 2018:**

\$21,615,882

Anticipated completion date: December 2020

Next Generation Fund

Created in 2018, the **Next Generation Fund** honors former General Director Timothy O’Leary’s accomplishments while providing resources to ensure a successful transition in leadership, and enabling Opera Theatre to continue its important work cultivating the next generation of artists and audiences.

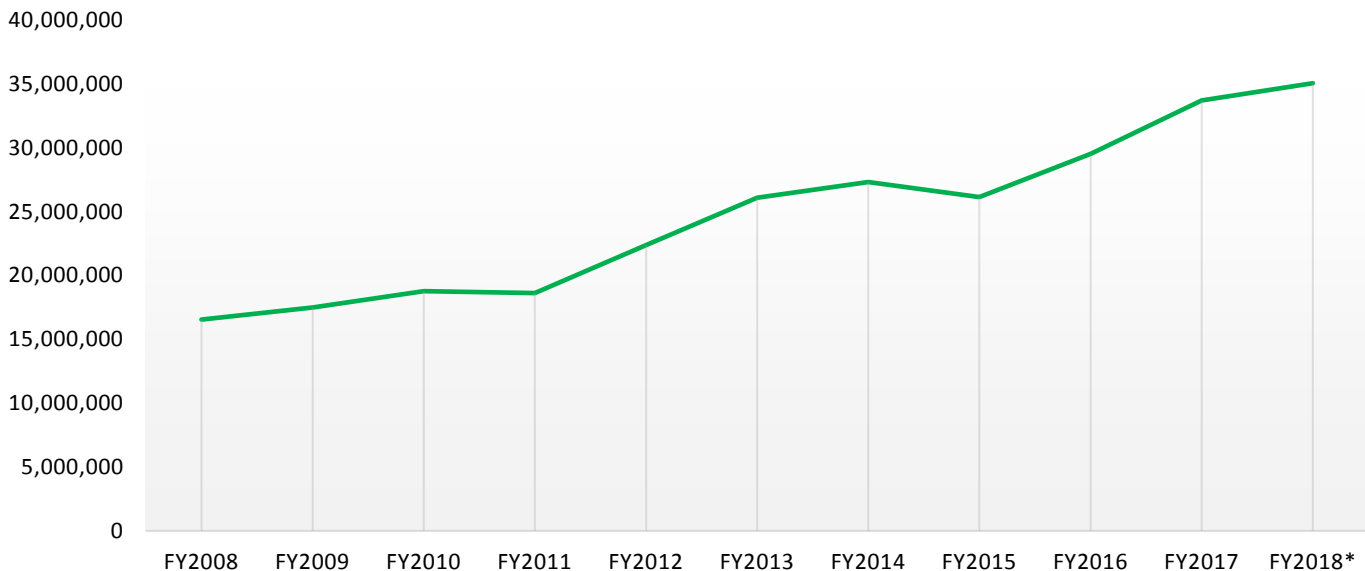
**Thanks to the success of the
2018 Spring Gala and the Berges-Neidorff Challenge,
the Next Generation Fund received support of**

\$844,252

which will be used to support
FY18, FY19, and FY20.

Endowment

The OTSL invested endowment portfolio has **doubled since FY2008**, up from **\$16.54 million** to **\$35.05 million** as of August 31, 2018.



*FY2018 invested endowment total amount is as of August 31, 2018. The remaining totals are as of September 30 of each year.

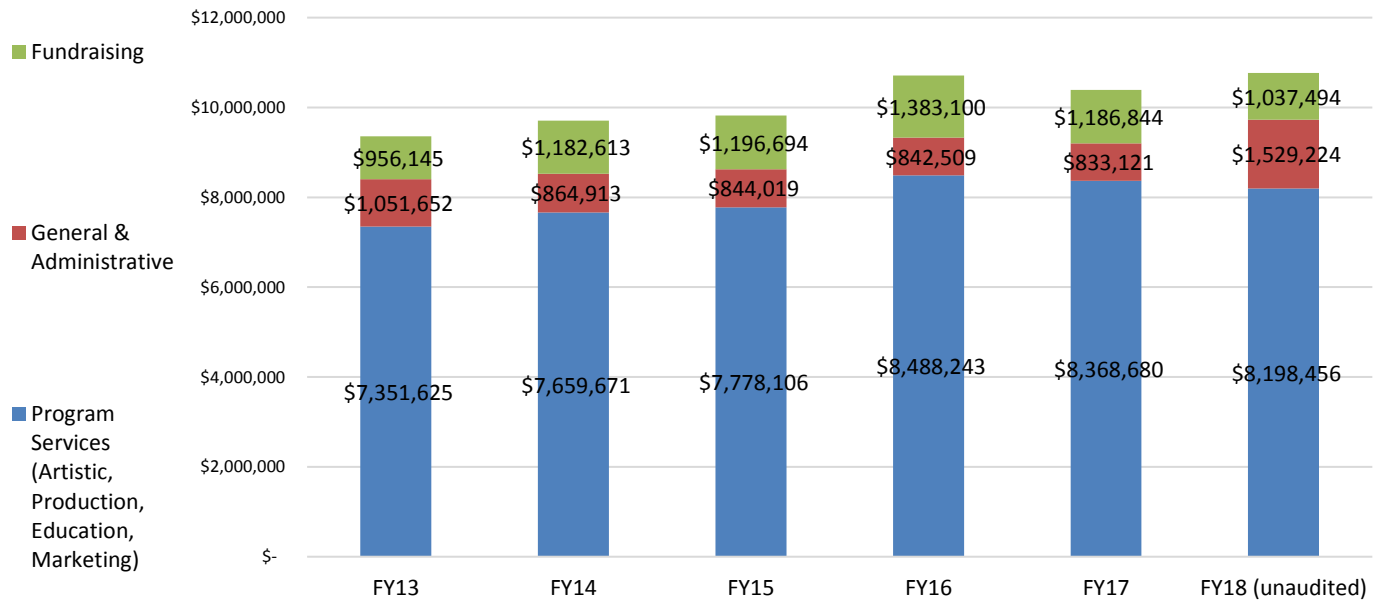
Financial Strength

	FY12	FY13	FY14	FY15	FY16	FY17	FY18*
Endowment Ratio: <i>(Portfolio Market Value/Annual Operating Expenses)</i>	2.5	2.8	2.8	2.7	2.8	3.1	3.2
Endowment Distribution Rate <i>(% of 3-year rolling average as of June 30)</i>	7.0%	5.5%	6.5%	6.0%	5.5%	5.5%	5.5%
Endowment Spending Rate <i>(Endowment Draw/Total Expenses)</i>	14.1%	12.2%	15.4%	15.4%	13.9%	15.0%	15.7%
Change in Net Assets	8.4%	14.1%	-0.7%	4.8%	7.6%	8.8%	2.8%

*FY18 represents unaudited numbers as of 8/31/18.

Annual Operating Expense Growth

Opera Theatre's annual operating expenses have grown 15% since FY13, at an average rate of 2.8% per year.



Total Operating Expenses	FY13	FY14	FY15	FY16	FY17	FY18 (unaudited)
	\$9,359,422	\$9,707,197	\$9,818,819	\$10,713,852	\$10,518,061	\$10,765,174

*FY18 represents unaudited projections as of 9/30/18. Administrative expenses for FY18 are still unallocated.