

Tracking Our Progress: FY19

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.

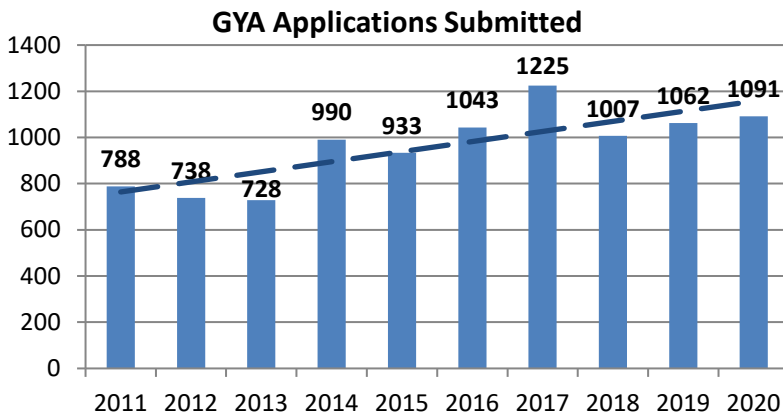


Patricia Racette named Artistic Director of Young Artist Programs

Celebrated soprano Patricia Racette joined Opera Theatre in September 2019 as the new Artistic Director of Young Artist Programs.

About the opportunity to take on this new role, Patricia said:

"Opera Theatre not only welcomed me for one of the earliest professional roles of my vocal career, but also supported my inaugural directorial project last year. The opportunity to shape the vision of this dynamic company sparks my passion to impact the operatic art form not only as a singer and director, but also as a teacher and a leader. As I expand my career, I eagerly look forward to helping identify and nurture the next generation of artists."



Applicants and Auditions

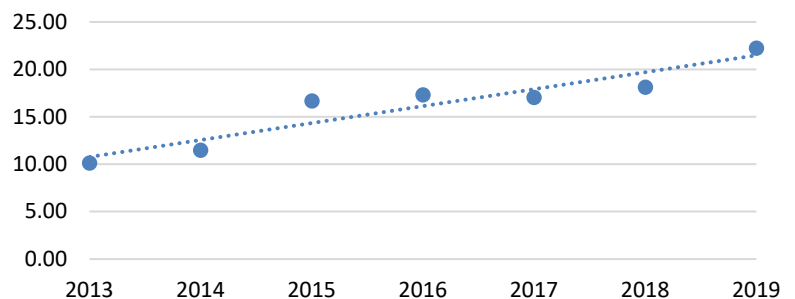
In 2019, **1,091 young singers applied** to participate in next year's Gerdine Young Artist Program, the second-highest ever!

There is of course 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). However, the renewed focus on supporting young artists which was part of the 2015 Strategic Plan, including the creation of the *Center Stage* concert and the recent addition of an Artistic Director of Young Artist Programs, has proved effective - **since 2015, the GYA program has consistently received more than 1,000 applications each year.**

Young Artist Coachings

The Gerdine Young Artist and Gaddes Festival Artist programs have continued to expand the training and personal attention young singers receive from Opera Theatre's music staff. **The average number of coachings per singer has more than doubled since 2013, with each young artist receiving, on average, 22 coachings per season in 2019, as compared to 10 coachings in 2013.**

Average # Coachings per GYA



John D. Levy Master Classes

30 out of 31

young artists

participated in a Master Class during the 2019 Festival Season.

Avg # Coachings per singer	10.11	11.44	16.67	17.31	17.03	18.1	22.23
# GYAs/GFAs	35	36	33	39	35	30	31
Total # Coachings	354	412	550	675	596	543	689

Artists-in-Training Alumni Return to the OTSL Stage!

The 2019 Festival Season included the return of **four alumni** of the Bayer Fund Artists-in-Training program:

Julia Bullock



AIT Years: 2003, 2004
2019 Role: Destiny/Loneliness/Greta, *Fire Shut Up in My Bones* (OTSL Debut)

Chaz'men Williams-Ali



AIT Years: 2006, 2007
Past OTSL: 2018 - Jazz, *Regina*
2019 Role: Spinner, *Fire Shut Up in My Bones*

Randell McGee



AIT Years: 2011, 2012
2019 Roles: Gerdine Young Artist; Court Usher, *Rigoletto*;
Adult James, *Fire Shut Up in My Bones*

Michaela Wolz



AIT Years: 2013
Past OTSL: Gerdine Young Artist 2017; 2018
2019 Roles: Gaddes Festival Artist;
Amore, The Coronation of Poppea (OTSL Debut)

What do artists like about their experience at Opera Theatre?

In their own words:

"I think Opera companies should be lifted up when they are doing great things. I'm late to the party as this is my debut season at Opera Theater of Saint Louis but I am so impressed by the support artists receive! I'm a little blown away 😊 Loyalty (Many returning artists and quite a few from both their high school program and YAP [young artist program], a diverse group of young artists, the engaging/promotion of NATIVE St. Louis talent (many singers rarely get to work at their hometown companies or in cities they reside in) fantastic community engagement.....I am observing and taking it in...very happy to be here at this time preparing this amazing piece with fabulous colleagues and staff! #OTSLFIRE #OTSL2019"

— Karen Slack
(posted on social media, June 2019)



OTSL Alumni Success!

80%

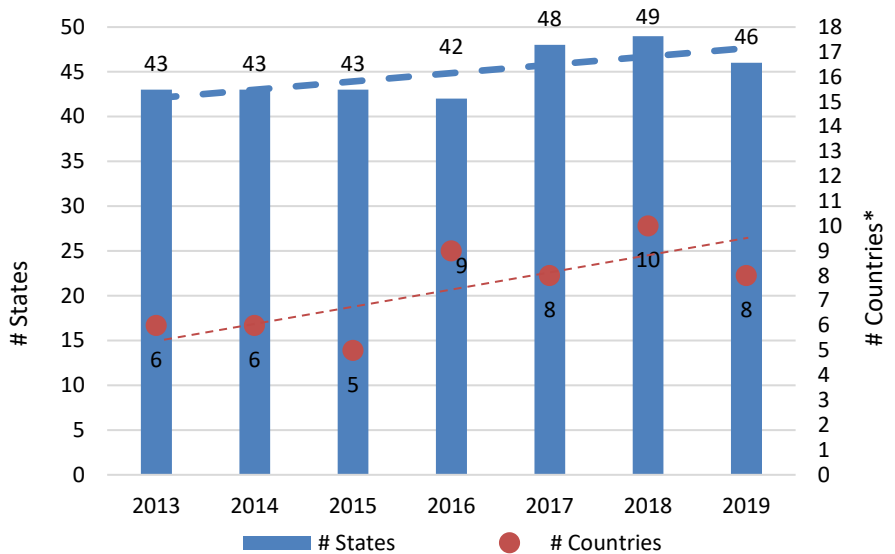
4 out of the 5 Winners

of this year's
**Metropolitan Opera
National Council Auditions**,
one of the country's most
prestigious awards
for young artists,
have appeared on
Opera Theatre's stage:

**Michaela Wolz,
Miles Mykkanen,
William Guanbo Su,
and Elena Villalón**

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 2019, we had ticket buyers from 46 states.**



*The country count in each year does not include students from the AFS foreign exchange student program. In 2019, these students represented 9 additional countries, bringing the total countries represented to 17.

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.

Below are notes from a few alumni on where they are now, and how OTSL helped get them there!

Hans Fredrickson (2006, 2008 Emerson Behind the Curtain program)

Hans is currently OTSL's technical director! In his own words, the Emerson Behind the Curtain program taught him:

"Planning. It's all about planning and the OTSL season requires you to have a fairly detailed plan long before you start the actual work. [In the program] I spent a semester researching, budgeting, drafting, revising, and purchasing parts for an ethernet system to enhance the lighting control network. All of those skills are the critical functions of my current role at OTSL. And I'm glad I was able to start honing those skills early in my career as they eventually were the reason I was brought back to fill the position of technical director year-round."

Bess Moynihan (2008 Emerson Behind the Curtain program)

"I am the production manager for Washington University's Edison Theatre and 560 Music Center. I am also a resident artist, scenic designer, technical director and lighting designer for various small professional theatres in the St. Louis Region... The experience of helping put together an expert level theatrical repertory season helped me learn the logistical process of producing, effective leadership and efficient time management."

Ben Lipinski (2013 Emerson Behind the Curtain program)

Ben is currently the technical director at the Mercury Theater Chicago. When asked what he learned in OTSL's program, he shared "What a large-scale professional process looks like. The exposure to OTSL caliber work informed every show I've done professionally. It provided a platform for launching my career. The insights and vocabulary gained from OTSL exposure are consistently useful."

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.**

	2012	2013	2014	2015	2016	2017	2018	2019
New York Times		X	X		X		X	X
Financial Times	X	X	X		X		X	
Wall Street Journal	X	X	X	X	X	X	X	X
Washington Post		X	X			X	X	
Chicago Tribune	X	X	X	X	X	X		
Opera News	X	X	X	X	X	X	X	X
Opera Magazine	X	X	X	X	X	X	X	X

2019 Quotes

"An intimate, 960-seat theater was to experience opera as it was intended to be: engrossing music drama, with an emphasis on the drama"

- [Anthony Tommasini, *The New York Times* – June 2019](#)

"Wrenching drama...demonstrates opera's remarkable ability to get inside a character's head"

- [Heidi Waleson, *The Wall Street Journal* – June 2019](#)

"It's one of the loveliest operagoing experiences anywhere, and quite unlike any other"

- [Scott Cantrell, *Dallas Morning News* – May 2019](#)

"Opera Theatre of Saint Louis presents one of the country's finest festival opera seasons"

- [Sarah Bryan Miller, *St. Louis Post Dispatch* – May, 2019](#)

"A first-person exploration of the black perspective, framed by uniquely black sensibilities and institutions...stunning to watch"

- [Kenya Vaughn, *The St. Louis American* – June 2019](#)

In the Media

Opera Theatre's 2019 Festival Season earned acclaim for its artistic quality and innovation.

OTSL was featured in

**5 separate
New York Times articles,**

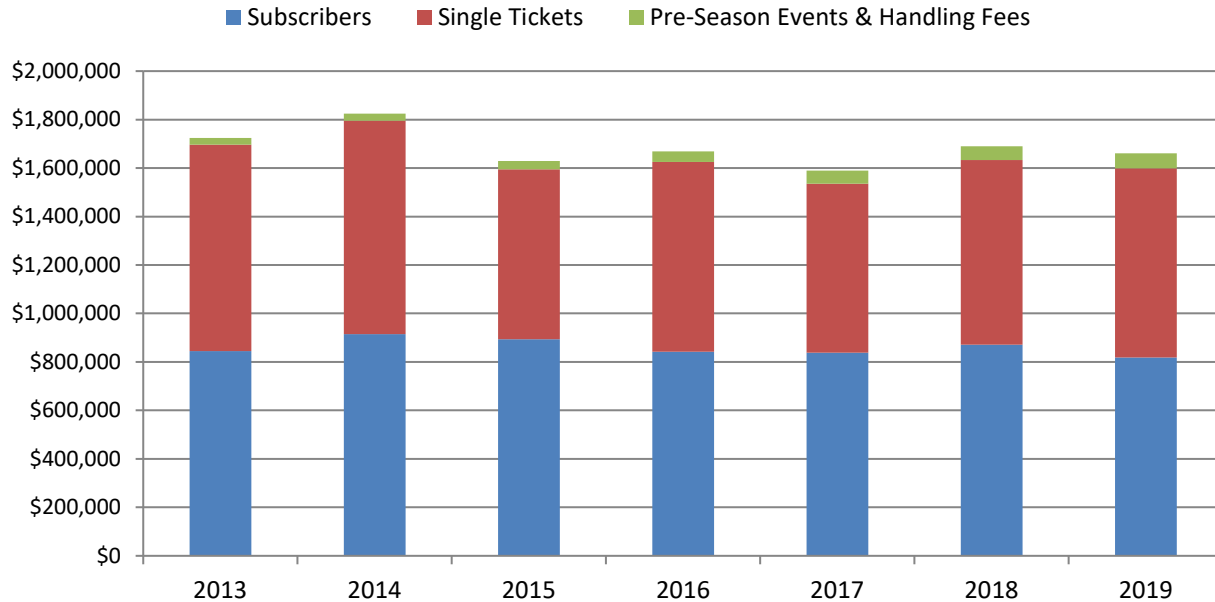
as well as reviews in

***The Wall Street Journal*
and media from
Dallas and Chicago.**

Priority Two: Engagement & Experience

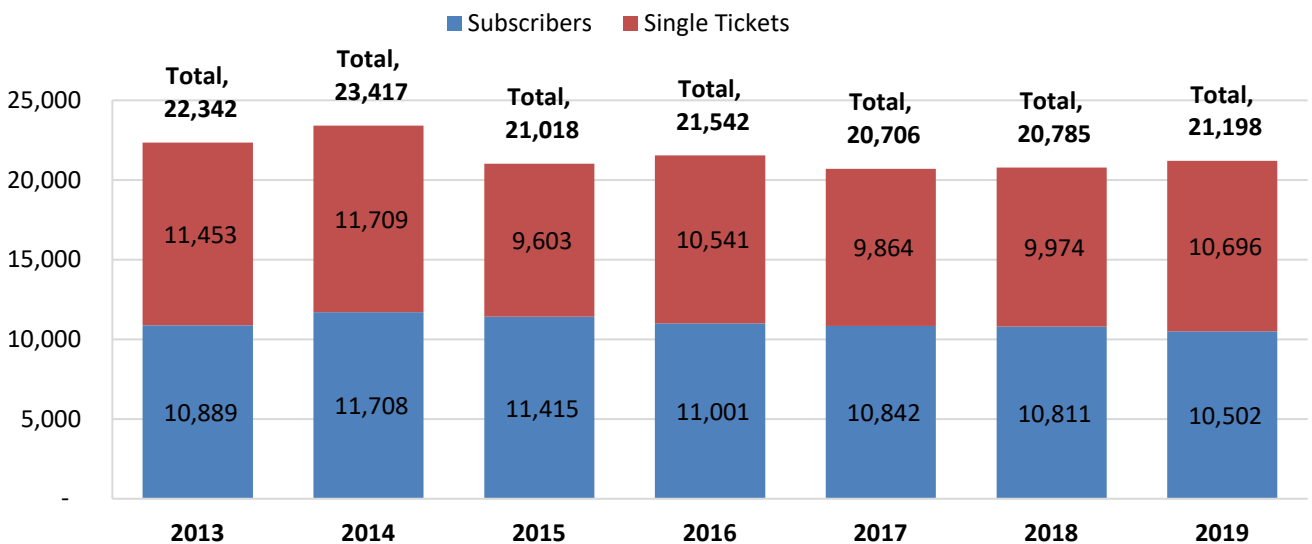
Overall ticket sales revenue for 2019 reached \$1,661,493, or 93.8% of the budgeted goal. Although this represents a decrease in revenue, the season performed strongly in total ticket volume, with an increase in ticket volume over last year. There was a 6% increase in total number of households purchasing tickets, as well.

Total Ticket Revenue



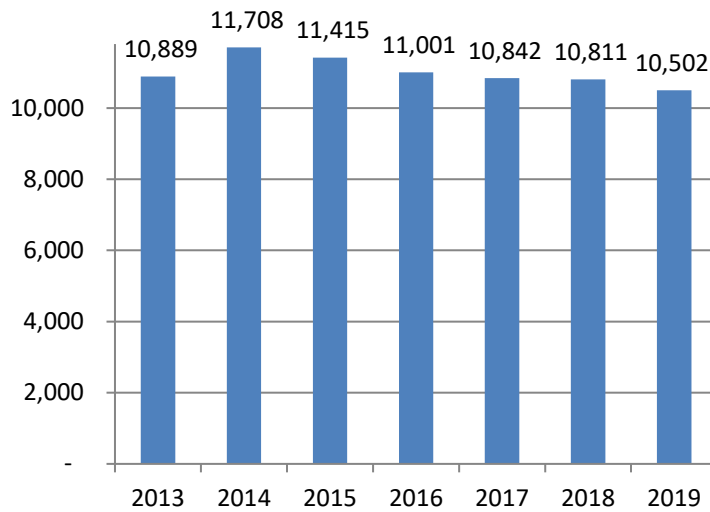
Subscribers	\$844,730	\$915,346	\$893,126	\$842,009	\$838,231	\$871,170	\$818,682
Single Tickets	\$852,245	\$880,061	\$701,312	\$782,635	\$696,955	\$761,871	\$780,535
Pre-Season Events & Handling Fees	\$27,426	\$29,574	\$35,324	\$44,633	\$53,872	\$56,298	\$62,276
Total \$	\$1,724,401	\$1,824,981	\$1,629,762	\$1,669,277	\$1,589,058	\$1,689,339	\$1,661,493

Total Tickets



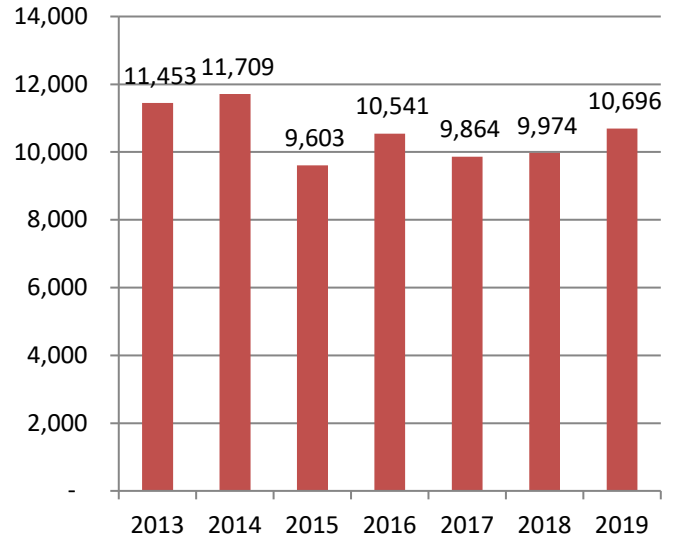
Total Tickets	22,342	23,417	21,018	21,542	20,706	20,785	21,198
Avg. Price	\$75.95	\$76.63	\$75.85	\$75.40	\$74.01	\$78.50	\$75.44
% New-to-file HH (of total tickets)	28%	26%	26%	26%	28%	26%	26%

Subscription Tickets



Renewal Rate	81.9%	89.2%	86.0%	86.4%	85.7%	85.6%	90.3%
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Single Tickets



Growing Our Audience

Opera Theatre continued its efforts to attract new audiences. The 2019 Festival Season saw:

6% increase
in audience households
over 2018

New, resonant works continue to draw new audiences:

42%
of single tickets buyers for
Fire Shut Up in My Bones
were new-to-file

Building the Future Audience

Opera Theatre also continued to focus on reaching younger and more diverse ticket audiences. In 2019 there was:

↑ 25% growth
in Young Friends ticket sales

↑ 25% increase
in GenX audiences

↑ 50% increase
in Millennial audiences

↑ 13% increase
in audiences of color

Convening Community Conversations

In 2019, OTSL welcomed the creative team of *Fire Shut Up in My Bones* — six-time Grammy Award winner Terence Blanchard, librettist and film maker Kasi Lemmons, acclaimed soprano Julia Bullock, and *New York Times* columnist Charles Blow — for public conversations with local artists entitled “Representation & Responsibility.” The year-long series sparked dialogue about the arts and racial equity in the St. Louis community.



As part of that residency, Wells Fargo Advisors invited Opera Theatre to present the same panel discussion as part of its Courageous Conversations series. **More than 700 people gathered at the St. Louis headquarters of Wells Fargo Advisors to participate.** These included members of WFA’s staff, leadership, and other community partners.

The panel featured composer Terence Blanchard, President & CEO of Jazz St. Louis Gene Dobbs Bradford, hip hop artist Bates, musician Joanna Mendoza, and Director of Wells Fargo Advisors’ Diverse Client Segments Group David Dawkins. The event also featured performances by Terence and soprano Karen Slack.

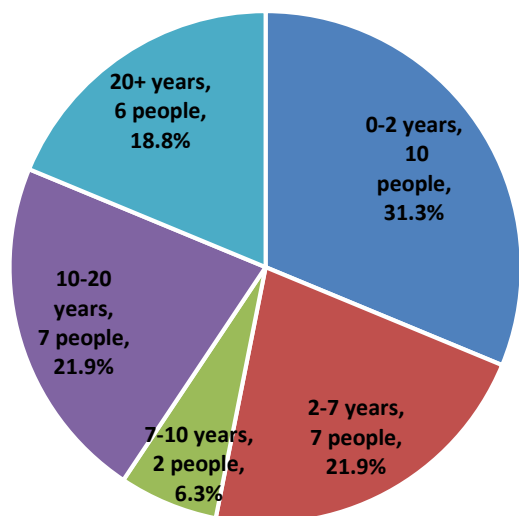
Following this hugely successful event, Wells Fargo Advisors hosted the 10th anniversary summit of their Black/African American network in June and purchased more than 200 tickets to *Fire Shut Up in My Bones* to bring members of the group to the opera.

Priority Three: Human Resources, Infrastructure, & Technology

Staff Tenures

The skills, expertise, and history of the OTSL annual staff continues to be one of the company's 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



Addition and Promotion of Staff

In 2019, Andrew Jorgensen completed his first year as General Director. **Opera Theatre also welcomed four new staff members:**

Maggy Bort

Production & Operations
Personnel Manager

Damon Bristo

Director of Artistic Administration

Laura Schlereth

Manager of Institutional Giving

Dawn Walter

Executive Assistant to the General Director

In addition, four of Opera Theatre's staff members were internally promoted to new positions.

Stacey Bregenzer

Senior Manager of Donor Engagement
*Promoted from Membership &
Development Operations Manager*

Nicole Freber

Managing Director of Advancement
Promoted from Director of Development

Anh Le

Director of Marketing and Public Relations
*Promoted from Assistant Director
of Marketing*

Michelle Myers

Director of Administration
*Promoted from Associate Director for
Strategy and Organizational Development*

Artistic and Music Staff

Each season, the artistic department grows from **4 full time annual staff members to more than 100 seasonal staff.**

Included in that number are approximately:

65 singers

27 artists on creative teams

*(directors, conductors, designers, choreographers,
assistant designers, etc.)*

14 stage managers

8 members of the music staff

**This is in addition to the members of the
St. Louis Symphony Orchestra!**

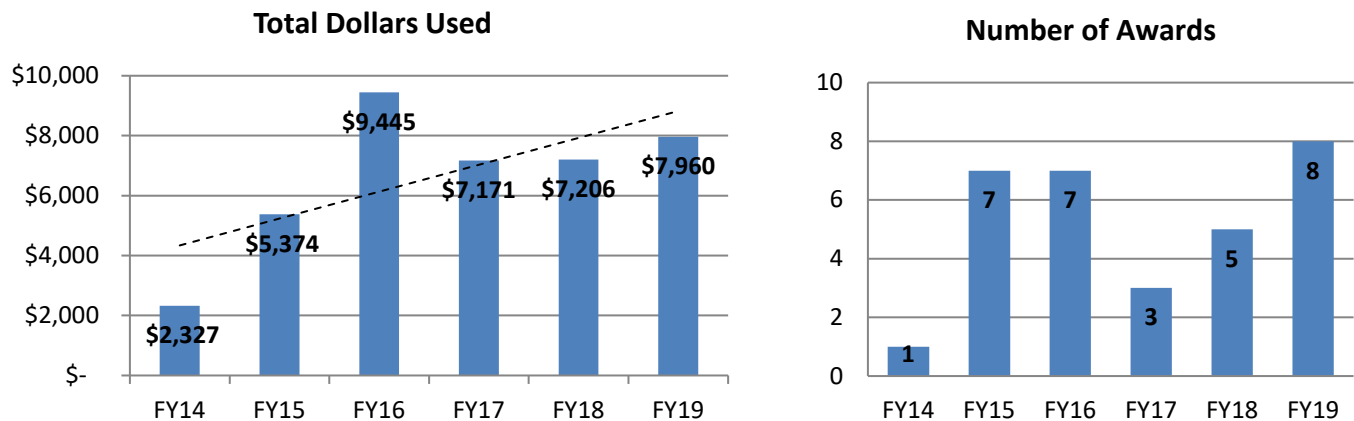
These 100+ company members work together to create beautiful music for the Festival Season productions.

Professional Development

The use of professional development funds has grown by approximately 342% since the fund was created in FY14*.

In 2019, eight staff members were awarded professional development funds, the highest to date.

Staff utilized these funds to develop skills by attending conferences, participating in OPERA America programs, attending seminars and workshops, and taking in-depth courses.

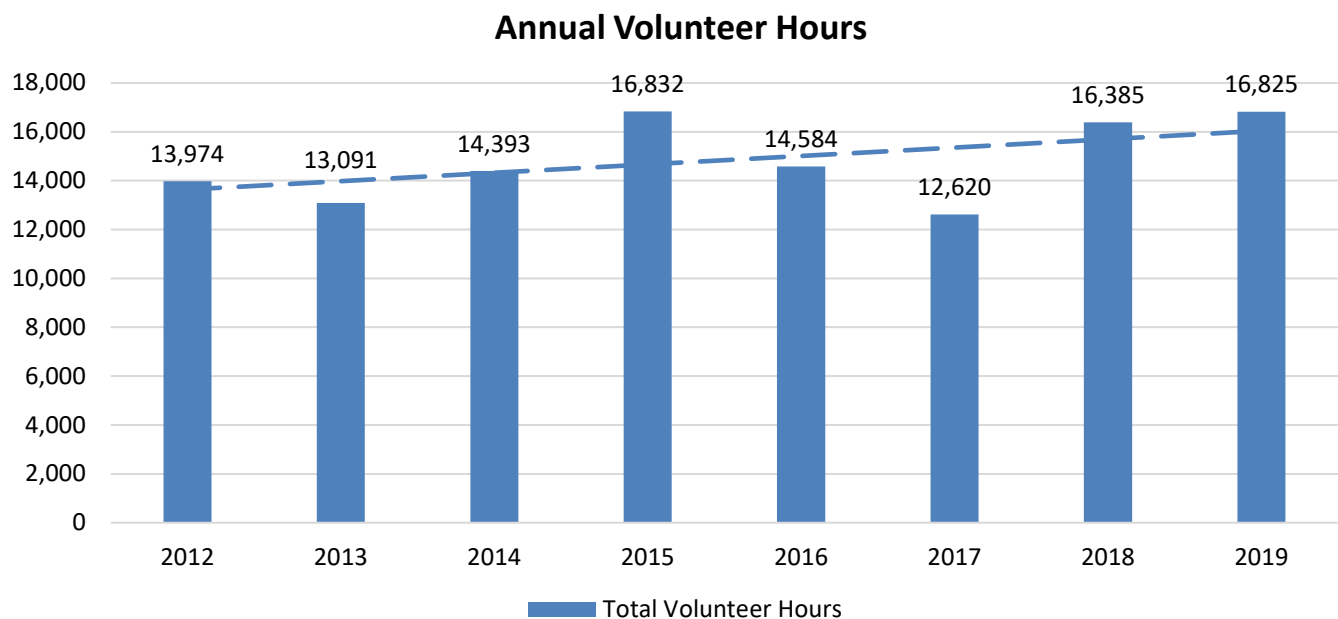


*Opera Theatre budgets \$200 per annual staff member each year for routine training programs. In addition, OTSL has a special allocation each year for staff professional development that is "above and beyond" required training. Employees are given the opportunity to apply for the use of these funds.

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 2019, these volunteers donated 16,825 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.

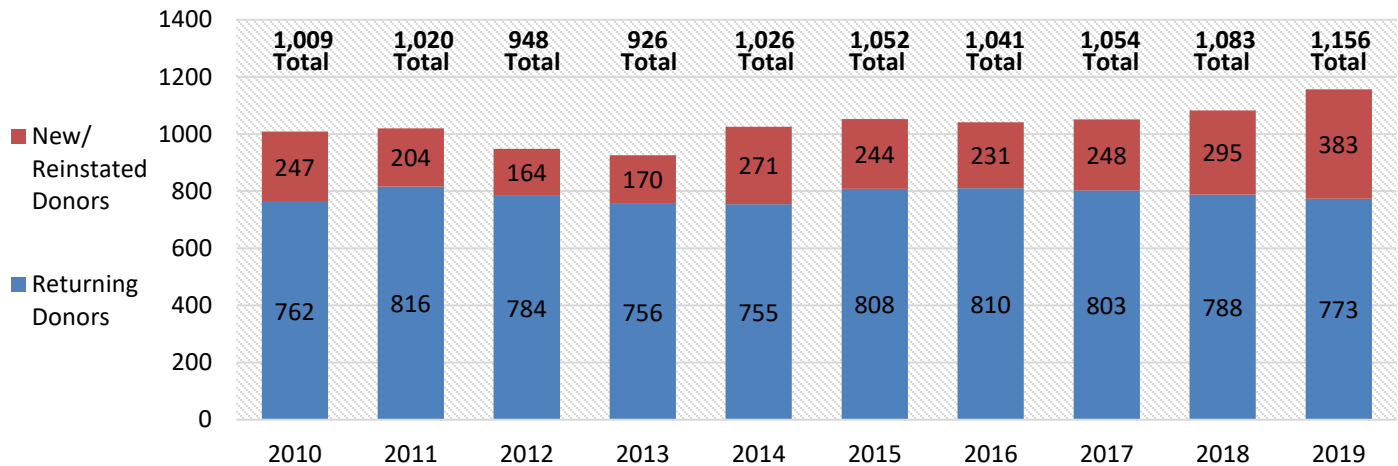


Priority Four: Capital Structure and Financial Strength

Total Annual Fund Donors (Individuals)

The total number of donor households increased by 7% from FY18 to FY19, and has grown by 14% since 2010.

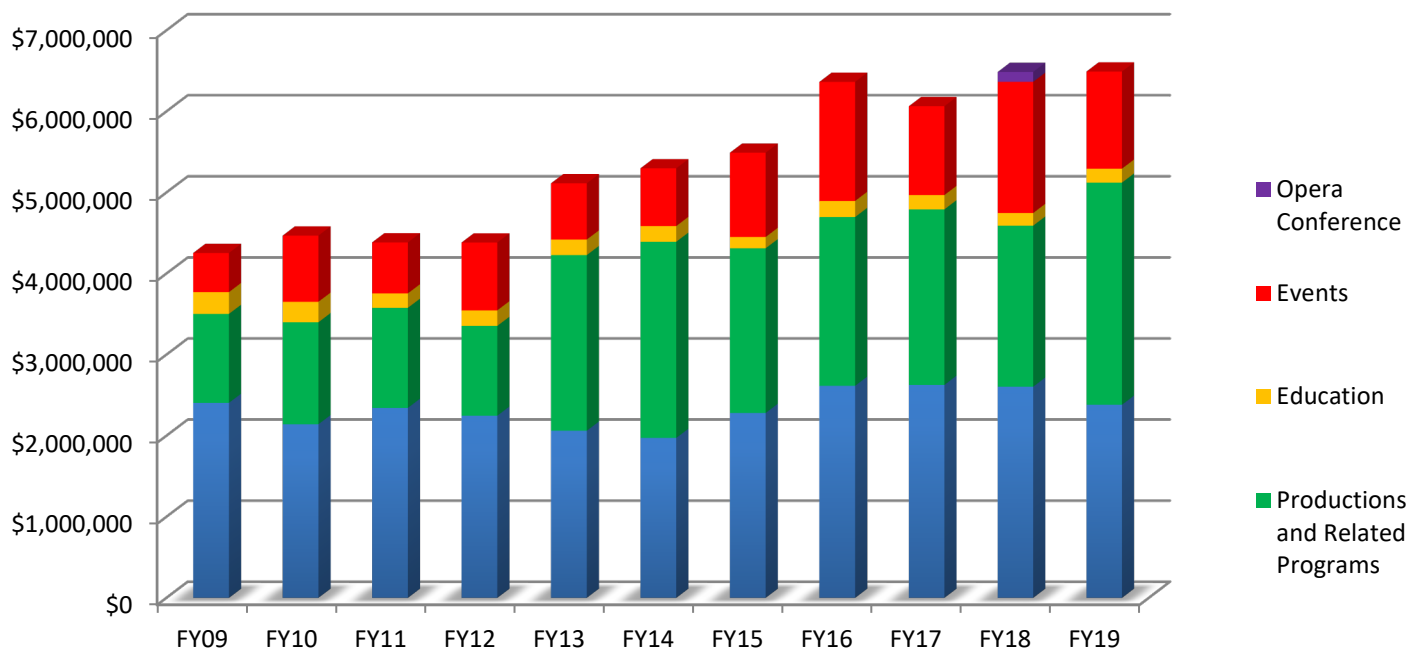
Opera Theatre's overall membership renewal rate was 78% in FY19. For the Friends of the Festival (who give \$50-\$2,499 annually) the renewal rate was 75%; this percentage increases to 94% for members of the Patron Program (who contribute \$2,500 or more annually). All three figures compare favorably to the national nonprofit donor renewal rate of 45.5%.



% Total Returning	76%	80%	83%	82%	74%	77%	78%	75%	73%	67%
% Total New/Reinstated	24%	20%	17%	18%	26%	23%	22%	24%	27%	33%
% Membership Renewal	74%	81%	77%	80%	82%	79%	81%	80%	79%	78%

Total Annual Operating Support by Fund

Opera Theatre achieved its highest contributed operating support in the company's history thanks to the collaboration of board and staff, raising 109% of the FY19 goal and ending the year \$542,204 over goal. Contributed revenue has grown more than 50% in the last 10 years.



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

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, 2019:**

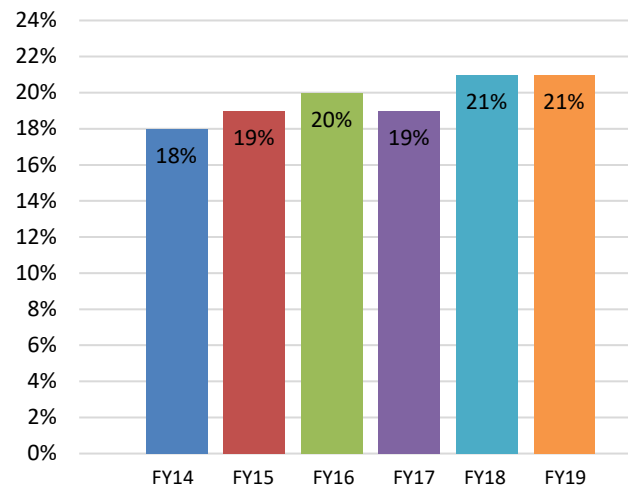
\$22,717,501

Anticipated completion date: December 2020

Ticket Buyers as Donors

In 2019, 21% of all regular season ticket buyers also donated to OTSL.

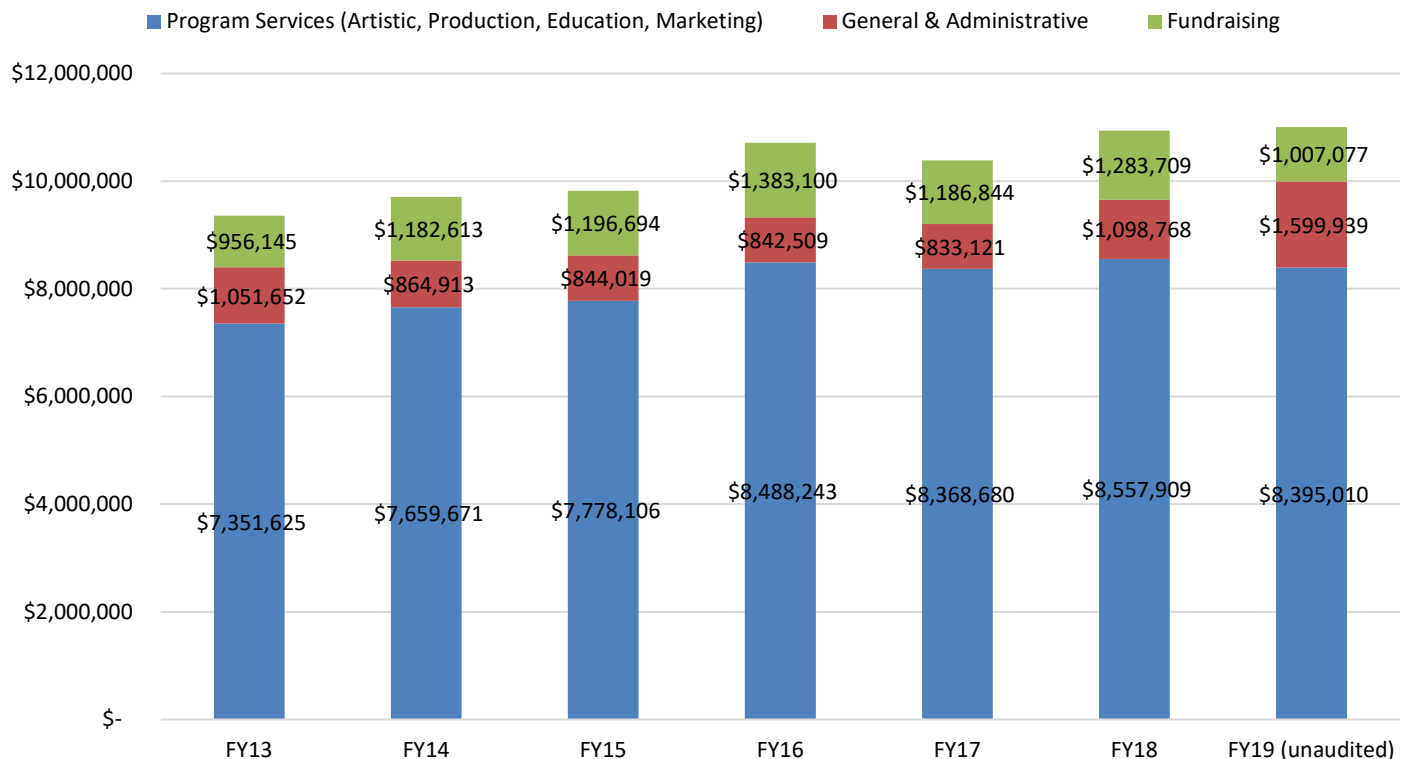
Ticket Buyers as Donors



Annual Operating Expense Growth

Opera Theatre's annual operating expenses have grown at an average rate of 2.7% per year since 2013.

Annual Operating Expenses

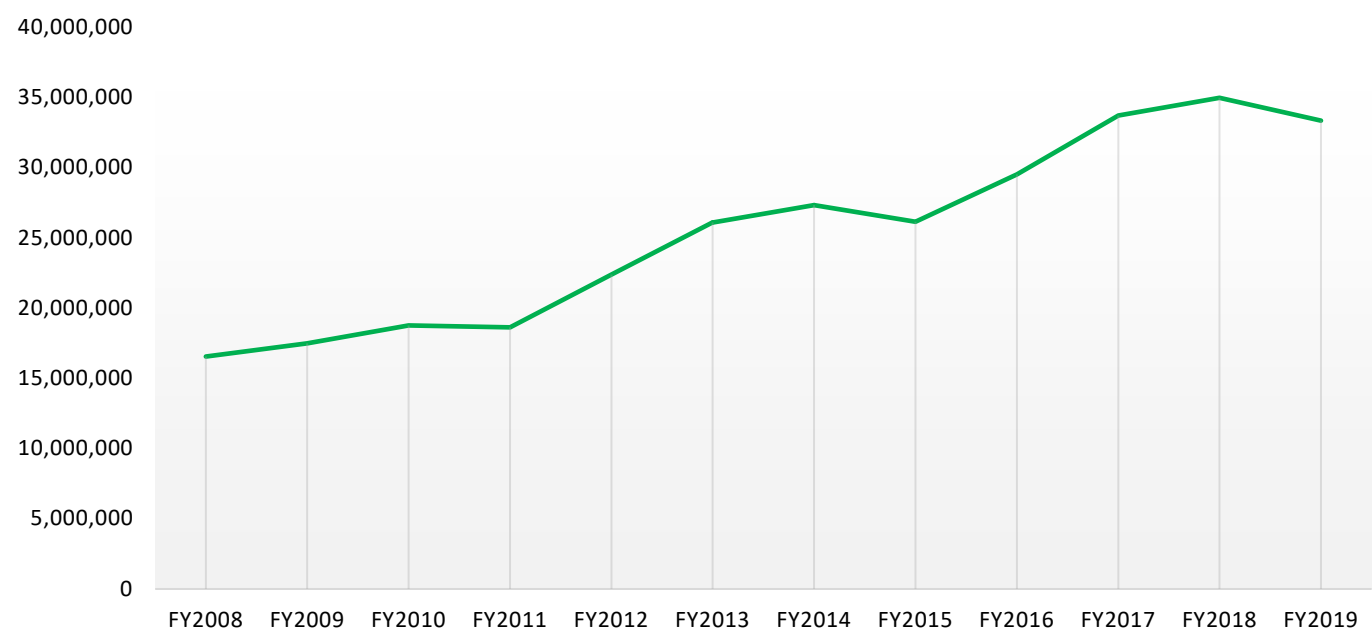


Total Operating Expenses	FY13	FY14	FY15	FY16	FY17	FY18	FY19 (unaudited)
	\$9,359,422	\$9,707,197	\$9,818,819	\$10,713,852	\$10,518,061	\$10,940,386	\$11,002,026

*FY19 represents unaudited projections as of 9/30/19. Administrative expenses for FY19 are still unallocated.

Endowment

The OTSL invested endowment portfolio has a value of \$33.3 million as of September 30, 2019.



*Values are as of September 30 of each year.