

OPERA THEATRE **OTSL** *of* SAINT LOUIS

2022-2026 Strategic Plan

TO THE 50th SEASON & BEYOND

APRIL 2022

TO THE 50TH SEASON & BEYOND

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Strategic Plan: TO THE 50TH SEASON & BEYOND

OPERA THEATRE'S MISSION is to shape a vibrant future for opera by connecting, inspiring, and entertaining our communities through the power and beauty of the art form; to foster the next generation by empowering a diverse group of artists, artisans, and administrators at the highest level; and to make opera accessible and inclusive through innovative and collaborative storytelling that reflects, engages, and strengthens the St. Louis community, and attracts national and international audiences.

Our Goal:

We seek to create an inclusive opera company that authentically reflects and engages with the St. Louis community, while being a national incubator for the art form – creating art and fostering artists and artisans of the highest level.

Our Strategic Priorities

ADVANCING THE NEXT GENERATION

Incubate the next generation of excellence in opera across all sectors of our company, anchored by our beliefs in fostering opportunity, expanding innovation, and advancing diversity.

- *We will continue to identify the next great on-stage talent through our young artist programs.*
- *We commit to implementing new and expanded ways to attract, train, and advance careers of rising opera professionals, building even more robust learning experiences for emerging talent in the production and administrative areas of the field.*
- *We understand that a stronger commitment to broadening access and increasing diversity will enhance the quality of our work. We will invest in providing additional equitable and inclusive hiring practices for all staff and company members.*

EXPANDING ACCESS & CONVENING OUR COMMUNITIES

Expand our impact and our audience through **increased access to opera** and **convening our communities** through operatic storytelling.

- *We will create works that inspire discussion in St. Louis and ignite the opera world.*
- *We will "show up" in more parts of our community more frequently throughout the year with stories that foster dialogue.*
- *We will engage passionately to educate and invite audiences of the future – diverse across lines of race, ethnicity, geography, age, ability, and background – to feel at home within the OTSL family.*

BUILDING FOR THE FUTURE – TO OTSL'S 50TH & BEYOND

Create the infrastructure of physical, human, and financial resources that will **sustain a vibrant future as we honor OTSL's 50th Season.**

- *We will identify and cultivate the next generation of Opera Theatre, building a robust, vibrant, and diverse board, staff, and family of supporters.*
- *We commit to identifying the next step, and taking action, to ensure we have facilities that elevate the artist and audience experience.*
- *We will plan a robust celebration of our 50th Season, honoring the traditions and successes of the past fifty years and setting an exciting vision for OTSL's next half-century.*
- *We will identify ambitious and appropriate goals that will sustain a responsible financial model, effectively address the company's facility needs, and support OTSL's continued artistic excellence.*

Grounded in EDI

All of Opera Theatre's work must be grounded in the values of equity, diversity, and inclusion.

This is not only essential to the future of our organization, but it is uniquely aligned with OTSL's mission of shaping the future of opera and nurturing opera's next generation.

Fostering a culture that enhances EDI ensures that the work of OTSL reflects the breadth of experiences, cultures, and perspectives found in our community, that the company becomes relevant and welcoming to everyone, and that OTSL remains a vibrant component of the St. Louis and national arts ecosystem.

Executive Summary

Opera Theatre of Saint Louis is a company built on powerful traditions including a commitment to nurturing young singers, presenting world class performances of both classic and groundbreaking repertoire, commissioning powerful new works, championing opera in English, and a Festival Season which attracts an international audience to St. Louis every summer. These hallmarks, combined with a robust community of engaged donors and patrons, a stable financial foundation, capable management, a more than 40-year partnership with the St. Louis Symphony Orchestra, and dedicated board leadership, offer Opera Theatre a strong platform and unique opportunities as the company contemplates its future strategic direction.

As we look ahead to our 50th season in 2025 and beyond, the company is building on the visionary foundation and principles of our founders – recasting and renewing that vision to reflect the social and artistic landscape of today.

Since beginning our planning process in early 2020, much has changed – for our organization and for the world: we saw profound disruption at every level of society in response to the pandemic, the crises of racial and social justice, and extraordinary economic uncertainty; we were the unexpected beneficiaries of one of the largest gifts ever to an American opera company; we had unique opportunities to exercise creativity and take important steps into the digital frontier.

As we navigated these challenges and opportunities, our vision for the future at Opera Theatre has been clarified and expanded: **We seek to create an inclusive opera company that authentically reflects and engages with the St. Louis community, while being a national incubator for the art form – creating art and fostering artists and artisans of the highest level.**

Leaning even further into this role of incubator, which the company has filled since its founding, enhances our role as creators, educators, and conveners of important discussions. It expands our role as innovators across all aspects of opera: creating and producing new works, finding and fostering young artists and artisans, thoughtfully approaching new subject matter, making the art form accessible to all, and welcoming new and more diverse audiences. This expansion also allows us to prioritize innovation over perfection, while maintaining the high artistic quality for which Opera Theatre is known.

We are more aware than ever of the importance of equity and inclusion. We want to make opera accessible for more people – on stage, backstage, in administration, and in our audiences – because we believe this art form has a vital role to play in serving our community. Doing so requires us to look at all of our work through a lens of equity.

Through this work, we are confident OTSL will continue to have even greater local impact, national presence, and global resonance. We are committed to ensuring Opera Theatre remains a leader in the field, plays an important role in St. Louis, and stays a vibrant and sustainable organization well beyond our 50th season.

OTSL's Strategic Priorities

Working and learning together for the last 18 months, Opera Theatre's board, staff, artists, and volunteers have crafted Opera Theatre's new strategic plan.

Opera Theatre of Saint Louis seeks to create an inclusive opera company that authentically reflects and engages with the St. Louis community, while being a national incubator for the art form – creating art and fostering artists and artisans of the highest level.

The following three key priority areas will guide our work as we move forward towards this goal across 2022, to the 50th Season in 2025, and beyond.

PRIORITY ONE: ADVANCING THE NEXT GENERATION

Incubate the next generation of excellence in opera across all sectors of our company, anchored by our beliefs in fostering opportunity, expanding innovation, and advancing diversity.

- *We will continue to identify and launch the careers of the next great on-stage talent through our young artist programs.*
- *We commit to implementing new and expanded ways to attract, train, and advance careers of rising opera professionals, building even more robust learning experiences for emerging talent in the production and administrative areas of the field.*
- *We understand that a stronger commitment to broadening access and increasing diversity will enhance the quality of our work. We will invest in providing additional equitable and inclusive hiring practices for all staff and company members.*

PRIORITY TWO: EXPANDING ACCESS & CONVENING OUR COMMUNITIES

Expand our impact and our audience through increased access to opera and convening our communities through operatic storytelling.

- *We will create works that inspire discussion in St. Louis and ignite the opera world.*
- *We will “show up” in more parts of our community more frequently throughout the year with stories that foster dialogue.*
- *We will engage passionately to educate and invite audiences of the future – diverse across lines of race, ethnicity, geography, age, ability, and background – to feel at home within the OTSL family.*

PRIORITY THREE: BUILDING FOR THE FUTURE - TO OTSL'S 50th & BEYOND

Create the infrastructure of physical, human, and financial resources that will sustain a vibrant future as we honor OTSL's 50th Season.

- *We will identify and cultivate the next generation of Opera Theatre, building a robust, vibrant, and diverse board, staff, and family of supporters.*
- *We commit to identifying the next step, and taking action, to fix the challenges of our facilities.*
- *We will plan a robust celebration of our 50th Season, honoring the traditions and successes of the past fifty years and setting an exciting vision for OTSL's next half-century.*
- *We will identify ambitious and appropriate goals that will sustain a responsible financial model, effectively address the company's facility needs, and support OTSL's continued artistic excellence.*

OTSL'S STRATEGIC PLAN

The following pages share details about Opera Theatre's strategic planning process and the learnings that came out of that process. In addition, pages 17-24 contain more detailed tactics and recommendations to support the three strategic priorities that form the foundation of OTSL's five-year strategic plan, taking the company from 2022 through the 50th Season in 2025 and beyond.

Setting the Stage

Opera Theatre's previous strategic plan was adopted in February of 2015. That plan focused on building Opera Theatre's artistic leadership in the opera field, curating the audience experience, connecting with our community, and strengthening our human resources, infrastructure, and financial sustainability. The 2015 plan helped broaden and diversify the Opera Theatre audience, while solidifying the "Opera Theatre experience," which in turn led to increased engagement with those audiences. It also resulted in a renewed focus on commissions in the New Works, Bold Voices series, supporting innovation and risk more regularly through the Innovation Capital Fund, and putting our young artists front and center by launching the now annual *Center Stage* concert.

The 2015 plan set goals for five years, and in January 2020, with new executive leadership, the company began to reflect on the organization's accomplishments, vision, and to articulate new strategic goals. Over the course of more than 25 meetings, over 230 friends of Opera Theatre took part in the creation of this strategic plan, including members of the staff, Board of Directors, Guild Board, National Patrons Council, Engagement & Inclusion Task Force, and Young Friends Steering Committee, as well as artists, educators, and community leaders.

Mission Statement

Opera Theatre's mission remains fundamentally unchanged — to shape the future of opera and to connect our communities through this versatile and resonant art form. Through this strategic planning process, we have refined our mission statement, to reflect this mission and the values and principles guiding Opera Theatre today.

Opera Theatre's mission is to shape a vibrant future for opera by connecting, inspiring, and entertaining our communities through the power and beauty of the art form; to foster the next generation by empowering a diverse group of artists, artisans, and administrators at the highest level; and to make opera accessible and inclusive through innovative and collaborative storytelling that reflects, engages, and strengthens the St. Louis community, and attracts national and international audiences.

The Process

Opera Theatre has a long history of robust strategic planning. Building on that history, we launched a new planning process in January 2020. While we understood how vital the process would be, we could never have predicted at the outset how the circumstances of our world would extend and change our work.

Facilitated by Collaborative Strategies, Inc., we began by assessing OTSL's achievements of the last few years, taking inventory of our strengths and challenges as an organization, and looking to leaders in the arts to understand broader trends in the opera field. We heard from more than 230 individuals - **board and staff members, company members, volunteers**, experts in the field from **OPERA America and The Wallace Foundation, leaders in the St. Louis community**, and other **key stakeholders**.

Just as we were beginning our planning, the COVID-19 pandemic began. This public health crisis, resulting in so much uncertainty including the cancellation of the 2020 Festival Season, required a necessary pause in our planning. However, rather than sit back, the Strategic Planning Committee used that time to embark on a **learning journey – to reflect and study the significant changes and innovations in our industry**, all of which were happening in real-time.

In addition, as part of the overall strategic planning process, a series of “Listening Sessions” were held with community leaders both virtually throughout 2020 and in person as it was safe to do so in 2021. These conversations facilitated opportunities to hear directly from those leaders about their aspirations and vision for St. Louis and thoughts on how OTSL can support and advance our community. These sessions were a crucial silver lining of the pandemic, offering our strategic journey broader insights than we would have otherwise gained.

Based on that foundation of learnings, as we prepared for a return to a Festival Season in 2021, working groups convened to focus on four key areas: **Artistic Values, Commitment to our Community, Places & People, and Audiences & Experiences**. In each of these groups, board and staff leadership addressed pressing questions and discussed choices, tensions, and tradeoffs around how we allocate our many resources, including artistic energy and focus, staff time and bandwidth, and social capital, as well as financial resources. Understanding that the themes of financial sustainability and human resources (staff, board, artist, and volunteer) run through each of these areas, a group of board representatives from the Finance and Human Resources Committees met to discuss the resources necessary to advance the goals and ideas put forward in all the priority areas.

Finally, throughout the planning process, it was affirmed that **all of Opera Theatre's work must be grounded in the values of equity, diversity, and inclusion**. Following the completion of an in-depth EDI audit & assessment of the organization in fall 2021, **a new board-level EDI committee was formed**. This committee's work began with creating an institutional plan to advance equity, diversity, and inclusion at every level of the organization. This EDI plan is crafted to align with and to respond to this strategic plan – intersecting and responding to the priorities, goals, and tactics identified throughout this document. **Together, the two aligned plans will operate holistically as the foundation for Opera Theatre's work.**

Building on a Solid Foundation

As we launched our strategic planning process, we took stock of our company, celebrating the many strengths and accomplishments on which our new plan would build. These strengths, some of which are highlighted below, along with OTSL's unique opportunities and challenges were examined through conversations with our many stakeholders – board, staff, artists and artisans, volunteers, and field and community leaders.

Strengths

- **Artistic excellence and presence**
 - Celebrated soprano Patricia Racette joined Opera Theatre in the new role of Artistic Director of Young Artist Programs.
 - The Gerdine Young Artist program continues to be a leader in the field, with more than 1,000 young singers applying each year to audition for the 28-32 positions in the program.
 - OTSL Artistic Director James Robinson made waves with his critically acclaimed debut at the Metropolitan Opera in 2019, directing *Porgy and Bess*.
 - Following its hugely successful premiere at Opera Theatre in 2019, *Fire Shut Up in My Bones* by Terence Blanchard and Kasi Lemmons went on the Metropolitan Opera, where it would make history as the company's first piece by a Black composer, followed by the Lyric Opera of Chicago.

- **Innovation:**
 - OTSL continues to be a catalyst for bold world premieres that attract opera goers from around the world.
 - The company continued to take well-calculated risks on new works in the New Works, Bold Voices series. Through the years of the previous strategic plan (2015–2020), OTSL presented 6 world and American premieres.

- **Community Engagement & Education**
 - Our education and community engagement programs continue to expand, adding the popular Opera Tastings program, new artist and creator residencies, and community panels.
 - The Bayer Fund Artist-in-Training (AIT) Program celebrated its 30th anniversary and continues to grow its impact on the lives of the more than 270 students who have participated since its inception.
 - In recent years, there was even more focus placed on the audience experience at the Festival Season, a unique quality that has been a hallmark of the company since its founding. New and increased investments in the pre- and post-show experience, and added events such as Innovation at the Opera, created a refreshed and exciting environment.

- **Strong leadership**
 - Across the staff, Board of Directors, and volunteer Guild, the leadership at OTSL have long and successful tenures, and bring vast experience and expertise.
 - In 2018, the board identified the company's fourth General Director, Andrew Jorgensen, to succeed Timothy O'Leary.
 - The Board of Directors created a task force focused on adding diverse new members to its ranks. This work successfully set the stage for the new Equity, Diversity, and Inclusion (EDI) Board-level committee.
 - The dedication of the OTSL Guild continues to be the envy of the opera world, adding new committees, such as the Greeters, to respond to the goals and priorities of the organization.

- **Financial stability:**
 - Thanks to the immense generosity of our donors and patrons, OTSL has a strong financial foundation and a unique opportunity to allocate our resources for the greatest impact.
 - Building on its long tradition of financial responsibility and management, OTSL utilized the robust financial model created through the last strategic plan, and the expertise and guidance from the board, to ensure responsible budgets and financial decision.
 - In addition, in February of 2020, Opera Theatre announced one of the largest known gifts to an opera company. This gift of more than \$48 million from the estate of long-time patron and Life Board Member Phyllis Brissenden more than doubled the endowment.
 - Thanks to several additional generous endowment gifts and successful investment growth, the endowment surpassed \$100 million in September of 2021.

Opportunities and Challenges

Along with the company's strengths and successes, there continue to be opportunities for growth, important questions to ask, and challenges to face.

- As the options for entertainment in the world expand, how do we make the case that Opera Theatre, and the operatic art form, remains a vital and engaging art form for all, not just the "legacy" audience?
- As a 6-week Festival Season, can we continue to combat the perceived lack of local presence and recognition, and move from being the "Best Kept Secret in St. Louis" to become well-known by the entire community?
- What stories are we telling and how can we ensure those decisions are made through a lens of inclusion, and in a way that authentically resonates with our communities?
- Acknowledging the great strides that have been made in how we cast and reflect diversity on our stage, what is the work that is still needed there and in other areas of the company to increase our diversity and to reflect the diversity and vibrancy of our entire community?
- With an aging audience and donor base, how can we expand and grow our reach to bring in new people and cultivate lasting, strong relationships?
- Are our facilities well-suited for creating artistic products of the highest quality?
- Even with the financial stability and resources we have, the challenges of building a financially sustainable company remain. Because the art form relies so heavily on people – the singers,

designers, productions crews, musicians, and so many more - there are very few efficiencies or automations possible to reduce expenses. As a result, earned revenue through ticket sales alone cannot increase at the same rate as these expense increases. How can we address this financial gap in a sustainable way?

With this solid foundation and set of traditions, and fresh from the transformative endowment gift from Phyllis Brissenden's estate, our discussions were filled with a sense of immense possibilities and energy to undertake these opportunities – visions and goals of increased work in the community, building infrastructure to take us to and beyond the 50th season, and creating deeper institution-wide commitment to EDI.

Through the early part of this process and across every constituency, consistent themes began to emerge around our institutional goals and priorities:

- Leveraging our unique artistic resources to have a greater presence in the community and outside of the festival season;
- Building a pipeline not just of singers, but of talented artists, artisans, and administrators for the opera field;
- Creating infrastructure (people, financial, and physical) to lay the groundwork to take us beyond the 50th season and into the next 50 years;
- Continuing to build OTSL's financial sustainability;
- Articulating and implementing a deeper institution-wide commitment to EDI, along with methods of holding the institution accountable to those priorities and goals.

Our Learning Journey

Though the challenges of 2020 and 2021 created a necessary pause in our official strategic planning process, that pause gave us valuable time to embark on a more robust journey to explore and understand our field and community. The evolutions in our field and the important questions our community partners asked of us encouraged OTSL to embark upon several different kinds of learning:

- **Organizational learning:**
 - At OTSL, we were suddenly reinventing everything about our work. Decades-old patterns were impossible to continue safely and had to be set aside in an effort to keep our company members safe and to remain relevant and current. Early success of that learning was demonstrated through:
 - Our digital #ThisIsOTSL festival, which required rapid learning and adaptation to transfer our live art form to the digital space;
 - Arts United, creating new and different kinds of collaboration with our community;
 - Many virtual patron and donor events which amplified our digital work and enabled continued engagement with our donor community.
 - Each of these programs was entirely new, requiring the OTSL team to think creatively and to develop new skills. But one thing became clear: we were nimble enough to adapt and respond to the changes in our field.

- **Internal Learning:**
 - As the summer of 2020 got underway, many of us were suddenly on accelerated journeys of personal growth due to both the stresses of the pandemic and the racial reckoning occurring throughout the country.
 - OTSL staff members shared learnings with fellow colleagues, beginning study groups to read about and discuss challenging topics including unconscious bias and structural racism.
 - Through OTSL's professional development funds, opportunities were available for year-round staff to participate in trainings and discussions.
 - Through the fast transition to remote work, the staff adopted new tools and workflows, identifying efficiencies, and finding new ways of collaborating with each other.

- External learning:
 - About our field:
 - All arts organizations grappled with extraordinary changes in 2020. And so, despite being completely separated because of lock downs, we were learning more together — about the opera field, about our institutions, and about the role of the arts in our communities.
 - OPERA America quickly pivoted to convene virtual learning — hosting discussions, panels, and webinars — offering an incredible number of new opportunities to learn from experts and each other.
 - Through virtual platforms, and with traveling halted and so many plans cancelled, leaders in our field were suddenly more readily available for these presentations and discussions. Key examples included:
 - A panel convened by LA Opera, featuring Black artists and led by J’Nai Bridges, which sparked important conversations with Board and staff members about equity at opera companies across the country.
 - OPERA America’s 50th annual conference in 2020 highlighted new and expanding virtual technology and brought new ideas and vocabulary to our digital work. The focus for the conference – *Having a Vision for the Future* – reminded us that opera can be an ever-evolving, forward-looking art form. One particularly poignant quote that was shared by Marc Scorca in the opening of the conference, originally written by the founder of OPERA America in 1969, made this point especially well:

*“We are not custodians of the old order.
 We are not curators of establishment art.
 We must be oriented toward the future.
 It is our business to improve the quality of life.
 We had better become positive and not just stand by.”*

- Glynn Ross, Founder, OPERA America
- About our community:
 - Our learning was in no way confined to the arts. We also wanted to understand how the St. Louis community was changing and evolving. In order to hear directly from leaders in the St. Louis community, OTSL leadership began a series of “Listening Sessions.” Meeting with leaders from across various industries and companies, and with those more and less familiar with opera and Opera Theatre, these conversations facilitated a way to hear directly from those leaders about their vision for St. Louis and thoughts on how OTSL can support and advance that vision for the community.

- Thanks to the power of Zoom, these informative conversations began virtually in 2020, and continued in person as it was safe to do so in 2021. Plans are in place to continue these important conversations throughout the coming months.
- These conversations informed the ongoing strategic conversations with the Board, staff, working groups, and Strategic Planning Committee throughout this planning process. A detailed summary of these sessions can be found on pg. 29.

The impact of all this learning over the course of just one year can be seen in two important and overarching ways throughout this plan:

1. Reinforcing the organizational priorities identified in our original analysis and assessment, while simultaneously
2. Adjusting and informing the tactics and approaches we take as an organization to achieve those strategic priorities.

Early Accomplishments: Emerging Stronger

Although the formal process of strategic planning was paused during the pandemic, we were asking key strategic questions every day about the ability of a centuries-old art form to grow, thrive, and remain nimble in adverse circumstances. **These ongoing strategic discussions, combined with the company's need to respond more quickly than ever before to external forces and changes, gave us the opportunity to make significant progress, and achieve major early accomplishments towards our strategic priorities, long before the plan document was even published.**

There were many early accomplishments across 2020 and 2021 that have already begun to advance our strategic goals and make OTSL a stronger organization in many ways.

- After developing and presenting two completely different versions of our business model – a virtual festival and an outdoor festival – Opera Theatre is more flexible, more innovative, and more prepared to embrace new and adventurous ideas while understanding the importance of the organization's traditions and hallmarks.
 - New virtual programming reached nearly 158,000 households in 2020 and set the stage for filmed productions in the autumns of 2020 and 2021.
 - The OTSL team produced an entirely outdoor festival season on a parking lot, becoming one of the first major opera companies to return to in person performances following the COVID-19 cancellations.
 - Phyllis' Seats became a one-of-a-kind program, increasing accessibility by offering free seats at every performance in the Festival Season.
 - From the premieres that were part of the *New Works Bold Voices Lab*, to the revival of the long-neglected *Highway 1, U.S.A.*, Opera Theatre incorporated programming that was new, different, and relevant across the outdoor season.
- The loyalty and generosity of the Opera Theatre community was never more evident or crucial than during the cancellation of the 2020 season.
 - In that challenging moment, **37% of ticket buyers donated the value of their purchase to support our artists and artisans, allowing Opera Theatre to pay 50% settlements to every individual contracted for the cancelled season.**
- Our financial foundation has grown more solid, ensuring OTSL is able to continue creating art while maintaining its longstanding history of fiscal responsibility for many years to come.
 - With an increased endowment, OTSL adopted new investment tools and a revised investment policy in November 2020, **lowering our endowment draw from 5.5% to 3.75% in FY2021.** The ability to draw at a lower, more sustainable rate provides Opera Theatre with the resources to fulfill its mission while allowing the endowment to continue to grow, securing Opera Theatre's long-term future.

- The immense and accelerated learning illuminated a different understanding of how we fit into the landscape of the opera field and into the St. Louis community.
 - The listening journey helped us to see ourselves as a community asset; one that can use music and theater to foster understanding, dialogue, and learning, and to convene different parts of our St. Louis community.
 - The premiere of Terence Blanchard and Kasi Lemmons' *Fire Shut Up in My Bones* on the Metropolitan Opera's opening night in 2021 reinforced that our work can, and should, be the pipeline of the opera field going forward.
 - The learnings about structural racism and EDI helped us to understand that our commitment to advancing the next generation in opera must be implemented with greater intentionality, through an explicit lens of equity. And that we need to focus this intentionality not just on casting, but across all areas of the company.
- Leaning into the digital space in 2020 and 2021 strengthened our relationships with our existing audiences and helped us reach new audiences.
 - OTSL's partnership with Nine PBS on *Songs for St. Louis* was the first project of the Voices Fund: A Path for Empathy, Dialogue, and Change and leveraged traditional and digital broadcast platforms to reach more than 30,000 viewers.
 - In Fall 2020/Winter 2021, the new virtual version of Opera on the GO! featuring *The Pirates of Penzance* reached nearly 88,000 students across the globe!
 - While more learning is underway to understand if this impact is sustainable in a world that is back to in-person events, this audience of nearly 20 times the capacity possible for an in-person program highlighted that we must continue to explore new ways in which we can support the needs of schools and students.
 - Of the audiences that purchased the digital streams of the 2021 Festival Season productions, 58% were new audiences that had never previously purchased tickets to Opera Theatre, with purchases from 46 different states.

Because of these early strategic accomplishments, today we are emerging from the pandemic with clarified values, clear goals of who we want to be and how we want to serve both our field and our community, and a renewed sense of the value our organization offers. At an even deeper level, we were reminded of the value of the arts and a live communal performance experience.

While the fundamental goals of our plan may not have changed since the planning process originally convened, the ways we think about and approach them have changed dramatically. And we are already well on the path towards these goals!

Our Commitment to Equity

Opera Theatre is committed to the values of equity, diversity, and inclusion (EDI). Advancing these values is not only essential but is also uniquely grounded in our company's mission of shaping the future of opera and nurturing opera's next generation. We cannot fully live up to this mission if we do not create pathways that offer access to more people.

While EDI has long been part of OTSL's core values, we acknowledge there is much more we must do to foster a company that embodies these principles at every level, and across every strategic priority detailed in this plan.

Pursuing racial equity is critical to the future of our field. Without sustained and sustainable equitable practices, we will have fewer people engaging – on stage, backstage, in the administration, and in audiences – with the musical culture we share and love. We will lose valuable contributions from more generations of people of color and others who have been historically excluded from opera, and this will diminish the vibrancy of the art form.

By acknowledging the racial discrimination and structural inequities in our history, and actively working to dismantle it, we believe Opera Theatre will be able to have even more impact as a convener within our communities, to share more broadly that opera as an art form is profoundly valuable, and to provide access for more people to see a home for themselves within our art form and our institution.

In 2021, following an in-depth assessment of the organization's practices and policies, the OTSL Board of Directors formed an Equity, Diversity, and Inclusion Committee. This committee is charged with creating an institutional plan to advance equity, diversity, and inclusion at every level of the organization. This plan is crafted to align with this strategic plan, and to ensure each of the identified priorities, goals, and tactics is pursued with EDI as a core value. Together, the two plans will operate holistically as the foundation for Opera Theatre's work.

Moving forward, as a standing committee of the Board of Directors, the EDI Committee is charged with working closely with the General Director and the staff to oversee the implementation of the EDI plan. Additionally, and just as crucially, the EDI Committee will provide structures for accountability in order to advance OTSL's mission and embody its values as a diverse, equitable, and inclusive organization at every level. The committee will regularly review, assess, and revise the organization's EDI plan, identify annual goals, and determine metrics to measure and share progress towards those goals.

Fostering a culture that enhances EDI ensures that the work of OTSL reflects the breadth of experiences, cultures, and perspectives found in our community, that the company becomes relevant and welcoming to everyone, and that OTSL remains a vibrant component of the St. Louis arts ecosystem.

Strategic Priorities and Tactics

PRIORITY AREA ONE: ADVANCING THE NEXT GENERATION

Incubate the next generation of excellence in opera across all sectors of our company, anchored by our beliefs in fostering opportunity, expanding innovation, and advancing diversity.

Since the company's founding, Opera Theatre has held a unique place in the opera field as a leader in identifying and nurturing the next generation of talent. The first tenet of our strategic plan calls for us to both reaffirm and expand that identity. **We will extend our commitment to advancing the next generation of excellence in opera across all sectors of our company.** Through new and increased efforts, we will be an incubator for the art form.

- We will implement new and expanded ways to attract, train, and advance careers of rising opera professionals.
 - Identify and engage promising artists as composers and librettists for new works, providing important opportunities for artistic development.
 - Expand our commitment to engaging and promoting emerging directors and designers.
 - Appoint leadership on the brink of major careers across all areas, including a new principal conductor.
 - Foster even more performance opportunities and learning experiences for our young artists.
 - Have artists in residency in St. Louis throughout more of the year.
 - Create additional ways for participants in the Gerdine Young Artist Program to perform staged roles - through staged cover run-throughs, young artist specific productions and performances, additional concert performances, etc.
 - Invest additional resources into building even more robust learning experiences for emerging talent in the production and administrative areas of the field.
 - Expand the learning opportunities in the Emerson Behind the Curtain and Browning Production Fellowship programs.
 - Continue our investment in the Clayco Future Leaders Fellowship to advance the careers of administrators from historically underrepresented backgrounds, specifically those who identify as BIPOC (black, indigenous, and persons of color).

- Expand and adapt our recruitment processes for all areas.
 - Explore additional audition locations and recruitment strategies for young artist applicants.
 - Adopt best practices around publicly posting jobs, including more non-performing, non-audition-based positions, to ensure that many people outside of existing networks have access to roles at OTSL.
 - Build robust alumni groups for the GYA, Emerson, Clayco Fellowship, and Intern programs to connect networks, support company members as they advance their careers, and keep those individuals engaged with OTSL.
- Increase our investment in professional development opportunities for administrative staff.
 - Increase the allocation of financial resources available for professional development.
 - Build professional development opportunities into the calendar and expected workload of the annual administrative staff.

We understand that a **stronger commitment to broadening access and increasing diversity will enhance the quality of our work**. By successfully addressing many of the field-wide structural barriers to access, Opera Theatre will help to **fill the pipeline of the opera field with a stream of talented artists, artisans, and administrators who reflect the rich diversity of our community**, and who continue to celebrate the rich traditions of the operatic craft while simultaneously pushing the boundaries to shape and enhance the future of the art form.

- Working in collaboration with the EDI Committee, the strategic plan calls for additional investment in **commitments to support equitable and inclusive hiring practices. We will:**
 - Provide equitable resources, such as housing and transportation, for backstage artists to broaden access for participation in our crews.
 - Compensate competitively and equitably for all positions, including crews and interns.
 - Break down structural barriers to performance opportunities by exploring new audition models.
 - Develop clear and transparent expectations for communication, recruitment, and hiring practices for all job openings.
 - Re-evaluate our schedules, at the macro level of the entire Festival Season and at the daily schedule level, to ensure they are equitable and accessible for employees and students from colleges and programs across the country.

Importantly, quality has been a trait of Opera Theatre since our founding days, and quality will remain at the forefront of our artistic efforts. Opera Theatre will build on this strength and our skills for identifying and nurturing talent, so that when leaders in the opera field seek talent in every aspect of creating and producing opera, they will turn to OTSL as a source. And when aspiring opera professionals want to advance in the opera world, Opera Theatre of Saint Louis will be known as a premiere institution for gaining the necessary experience.

Responsibility and Implementation

These tactics will require the commitment and participation of the full board and every department across the company, but especially from:

General Director, Artistic Leadership (Artistic Director, Artistic Director of Young Artist Programs, Principal Conductor, Director of Artistic Administration), Director of Production, Director of Administration; and at the board level, the EDI Committee and HR Committee.

In the months following the adoption of this plan, these staff members, departments, and committees will identify how their work will advance these priorities and implement these tactics. They will set specific goals and metrics for measuring this progress, and report on them at least annually.

PRIORITY AREA TWO: EXPANDING ACCESS & CONVENING OUR COMMUNITIES

Expand our impact and our audience through increased access to opera and convening our communities through operatic storytelling.

Opera Theatre's most impactful community work in recent years has focused on engaging St. Louisans in dialogue surrounding the topics and stories of the work we commission. These conversations have allowed us to be of service to the region in new ways, offered entry points to opera for new friends, and sparked new partnership opportunities across the region.

Two major themes that make up the second tenet of our strategic plan expand on that work: to make the Festival Season inclusive for even more people and to "make more noise" throughout the year. Our Festival Season will remain our centerpiece, but it will be enhanced by a **larger artistic footprint across the calendar year so that we can be of service to, connect with, and be present in more of the St. Louis community.**

We will create works that inspire discussion in St. Louis and ignite the opera world, we will "show up" in more parts of our community more frequently throughout the year with stories that foster dialogue, and we will engage passionately to educate and invite audiences of the future – diverse across lines of race, ethnicity, geography, age, ability, and background – to feel at home within the OTSL family. Through this work, we will serve as a model for the field and continue attracting audiences from all parts of St. Louis and the world.

- As a pillar of the Festival Season, we will continue to regularly commission new works and produce important revivals of recent works that resonate within our diverse community.
- Additionally, we will undertake commissioning and performances outside of the Festival Season in collaboration with new artists and organizational partners.
 - This work will have the goal of disrupting the commissioning process by distributing power to local artists and local leaders to shape the stories and projects that we create.
- Build comprehensive residencies in the community, sharing not just one type of program, but planning a series of events to build authentic connections and serve more aspects of the community.
 - From Opera Tastings to concerts, school programs, and symposiums – we will use a variety of programming, grounded in the art, to bring our community together.
 - We will use residencies to convene important conversations about issues that matter to our region, and to create more entry points for our community to meet and experience OTSL.

We aspire to create the most accessible opera company in the country on every front by demystifying the art form, eliminating stereotypes of opera, and creating a universal sense of belonging for those who experience opera together. To do so, we will:

- Meet our community literally where they are, by exploring venues in different parts of our region and across the St. Louis metropolitan area for performances outside the festival season.
- Break down the stereotypes of opera by creating events and opportunities that remove traditional barriers to entry and are welcoming to first-time operagoers.
- Demystify opera by adopting new, inviting, and unusual ways of marketing the OTSL experience.
 - Incorporate video and other digital ways of communicating the OTSL experience
 - Interviewing diverse patrons to share their experience
 - Adopting an informal, welcoming brand voice appropriate for these communications.
- Expand education efforts and programs that prioritize introducing new audiences, including students and families, and welcoming people of all ages to opera in innovative ways.
 - Convene a “super group” of experts in education and engagement to provide insight on the needs of students and teachers in the St. Louis education community, and guidance on how best to allocate resources for the greatest impact.
 - Create a board-level committee focused on OTSL’s education programming, structured based on the guidance of the education “super group.”
 - Invest in the capacity of the Education Department in order to appropriately staff these expanded initiatives.
- Remove barriers for individuals who have disabilities.
 - Ensure all spaces and venues are not only legally accessible, but authentically inclusive to people who have disabilities.
 - Incorporate accessibility initiatives into our programmatic planning – audio description, sign language interpretation, appropriate aids for visual impairments, etc.

Responsibility and Implementation:

These tactics will require the commitment and participation of the entire board and every department across the company, but especially from the:

General Director, Artistic Leadership (Artistic Director, Artistic Director of Young Artist Programs, Principal Conductor, Director of Artistic Administration), Managing Director of Advancement, Director of Marketing & PR, Director of Education; and at the board level the EDI Committee, Marketing Committee, and Arts Connection Task Force.

In the months following the adoption of this plan, these staff members, departments, and committees will identify how their work will advance these priorities and implement these tactics. They will set specific goals and metrics for measuring this progress, and report on them at least annually.

PRIORITY AREA THREE: BUILDING FOR THE FUTURE – TO OTSL’S 50th AND BEYOND

Create the infrastructure of physical, human, and financial resources that will sustain and ensure a vibrant future as we honor OTSL’s 50th Season.

Thanks to the generosity of our community, leadership of our board, and dedication of our staff, Opera Theatre has a long history and foundation of financial security. This fiscal strength has enabled us to take artistic risks, prioritize excellence on stage, and expand our impact. **We are committed to bringing together the people, financial resources, and physical infrastructure that will further fortify and strengthen our company, so we can continue our work into a vibrant future.**

- **People:** As we approach and celebrate the 50th anniversary of our company, we will celebrate the founding generation and longtime members of the OTSL family, whose deep commitment has brought the company to this point, and we will also:
 - Renew the important efforts underway to **continue building a diverse, robust, and effective Board.**
 - **Identify and cultivate the next generation of the Opera Theatre family** including our Guild, National Patrons Council, Intermezzo Society, Young Friends, donor community, audience, and organizational partners.
 - **Invest in the administrative staff**, both adding capacity and increasing professional development.
 - Expand the capacity of the Education, Artistic, Advancement, and Fellowship teams to effectively support the work detailed in this plan.
 - Increase the allocation of resources available for professional development.
- **Physical Infrastructure:** Through ongoing conversations about our performance facilities, we recognize and acknowledge the challenges and limitations of our longtime theater. In this strategic plan, **we commit to identifying the next step for addressing these limitations and taking action to fix the challenges of our facilities.**
 - There will be no better time than the run-up to our fiftieth season to harness energy and enthusiasm to secure a home for our future.
 - The next generation of artists will be inspired to greater heights if they are able to create and perform in a first-class space.
 - The next generation of artisans will be better prepared to work in the field if they train and study in a modern theater.
 - The next generation of the St. Louis Symphony Orchestra will be heard as the great orchestra they are in a theater that showcases acoustic excellence.

- The next generation of audiences will be inspired by a beautiful theater that not only preserves the intimacy and character of the OTSL festival experience, but that elevates the artist and audience experience.
 - There are significant questions that must be considered, evaluated, and resolved:
 - Whether we renovate or build?
 - Whether we own a space or share with other institutions?
 - With whom do we partner to maximize usage and benefit for the community?
 - If we choose to build rather than renovate, what is the optimal location? If we choose not to build, what locations would be optimal for other off-season programming?
- **Financial Stability and Longevity:**
 - A landmark birthday requires landmark aspirations. As we prepare for the fiftieth season, we will plan a year-long celebration that honors the traditions and successes of the past fifty years and sets an exciting vision for OTSL's next half-century. This occasion will include:
 - Convening a **50th Anniversary Committee** to identify the appropriate activities and programs to celebrate this occasion, such as:
 - A **robust Anniversary celebration**, engaging the community in exciting and engaging events across the year.
 - A **50th Anniversary Gala**, honoring this milestone and those instrumental in the success of the company's first 50 years.
 - A project to **document and share OTSL's history**.
 - Launching a **comprehensive fundraising campaign** to honor this milestone, identifying ambitious and appropriate goals that will sustain a responsible financial model, effectively address the company's facility needs, and support OTSL's continued artistic excellence.
 - Because of the resources entrusted to us through the generosity of our community, Opera Theatre has a responsibility to marshal those resources to support a world-class company that demonstrates a clear impact on our community. As we consider that responsibility, and how Phyllis Brissenden's transformational gift has changed us, our institutional message must be clearly communicated.
 - OTSL has been given a unique opportunity, and we have risen to the challenge. With the resources that have been entrusted to this organization, we have been good stewards - expanding our impact on our community, supporting and investing in those who come to work with us, and pushing the boundaries of opera across a time of immense change and uncertainty. **As we move forward, we must continue to be bold in our vision, in our mission, in our programming, and therefore in the impact we have on our community and the opera world.**

Responsibility and Implementation:

These tactics will require the commitment and participation of the entire board and every department across the company, but especially from the:

General Director, Managing Director of Advancement, Director of Administration, Director of Marketing & PR, Director of Development, and the Director of Production & Operations; and at the board level, the Facilities Committee, Development Committees, Marketing Committee, and Finance Committee.

In the months following the adoption of this plan, these staff members, departments, and committees will identify how their work will advance these priorities and implement these tactics. They will set specific goals and metrics for measuring this progress, and report on them at least annually.

Implementing & Supporting Our Priorities

The work of strategic planning does not end with this document; rather, this document is a launching pad. There will be ongoing work, across every aspect of the organization, that must continue to address and live up to these strategic priorities. There are questions we must continually ask and steps we must take to ensure this plan is a living, breathing, part of Opera Theatre's institutional practice.

- **Every standing group and committee at Opera Theatre, all those who are making decisions about Opera Theatre's work, must identify how they will specifically support these priorities** – from the Board of Directors and Executive Committee to each Board committee, staff department, and volunteer group. What tactics will they take responsibility for implementing? How can their day-to-day work incorporate the strategies and priorities identified in this plan?
 - In the coming months, each of these groups will work with the General Director and the Board Chair to review responsibilities for the priorities set out in this plan, to identify and document how they are aligning their work with the organization's strategic goals, and to create a template for reporting on the progress of the tactics identified. This will be ongoing, with reports on progress at least annually, if not more often.
 - The “Listening Sessions” that were begun as part of this process will continue, with an evolving list of community leaders.
 - In order to appropriately advance learning in some areas, Opera Theatre may need to identify experts to share knowledge and insight. OTSL will develop “Super-Groups,” or short-term working groups of experts, to convene accelerated learning and leadership in these areas, such as K-12 Education or digital marketing.
- **By implementing these tactics and priorities, Opera Theatre will continue to expand our presence and impact, locally in the St. Louis region and nationally.** In order for this work to be effective, we must improve coordination among our programs, ensure their visibility in our community, and measure their results. We must think intentionally about every program we undertake – from treasured long-standing programs to new innovations. What are the goals of the program? Who is the audience? How are we advancing our goals of equity and inclusion?
 - The following rubric details how we are beginning to approach programming planning conversations with this level of intentionality – looking at objectives, target audiences, and potential metrics to measure success.

Purpose of Activity:	Expand the Audience for Opera	Advance the Art Form	Nurture the Next Generation	Serve as Thought Partner & Community Resource	Drive Interest In and Sell Tickets to the Festival Season	Raise Funds in Support of OTSL
Objective:						
Target Market:						
Events:						
Metrics for Success:						
Replicable Year to Year:						
Financial Implications:						

- In addition, for this work to be sustainable, we must ensure that we have the appropriate and necessary financial and human resources to support the work.
 - To address this question, we created financial and staffing models that look at projections and their implications for the next 5 years.
 - While these models, which use assumptions based on historical data, are not prescriptive budgets, they are important tools in our planning, and vital to understanding the longer-term financial impact of programming and other decisions.
 - These models bring into focus the potential areas of financial challenge and highlight where additional focus or adaptation is needed. They will continue to evolve and will be an important part of the ongoing strategic conversations, revisited by the financial and HR leadership at the company on a regular basis.
 - We must also ensure that our budget truly tells the story of the work we are doing, and how we are advancing OTSL’s mission.
 - How are we allocating financial resources? Is it in alignment with our strategic priorities?
 - Is that allocation communicated effectively to our stakeholders?
 - Beyond budget sustainability, we must also consider whether the programmatic schedule is supportable from our human capital perspective.
 - Discussion about prioritization of time and staff resources must happen regularly, evaluating each program in light of limited staff capacity to determine true effectiveness and feasibility.

Measuring Our Success

In addition to the rubric of programmatic goals and outcomes detailed above, we will consider the following strategic questions, evaluate the effectiveness of our work, and measure the success of the progress towards the goals outlined in this plan.

- Is the program in alignment with OTSL's role as an incubator for the art form?
- Does it prioritize and support educating, nurturing, and bringing new people into the art form?
- Does it push the art form forward?
- Are we offering experiences that enrich and deepen relationships with communities, or are we broadening reach and increasing numbers? While both depth and breadth are important, we prioritize richer experiences and sustained impact.
- Does the program tell a vital and resonant story, or does it celebrate and invite people to opera?
- Does the content provide an opportunity to authentically convene community conversations?
- Does it support a financially sustainable model, so that we can continue this work for years to come?

As we continue to think about the goals of Opera Theatre's programming, the definition of what success looks like must be decided with each specific initiative in mind and with clear pre- and post-project discussions to identify and assess those metrics. For initiatives both in the Festival Season, and beyond the mainstage festival productions, we will continue to develop new strategies to ensure these activities have the highest impact possible, while effectively reaching the intended audiences. We must identify new ways of tracking outcomes to measure that impact – on OTSL, on the St. Louis community, and on the opera world.

All of these strategic questions, metrics, and measures come back to the fundamental question of **what we are choosing to prioritize?** Ongoing discussions will ensure that the priorities and goals put forward in this plan stay at the forefront of Opera Theatre's work, anchoring each of our efforts in the principles and helping the company to grow in the direction of these strategic values to our 50th Season and beyond.

ADDENDUMS

Community Leader Listening Sessions

Summary of Learnings

Over the course of a year, Opera Theatre organized meetings with sixteen leaders whose expertise spanned the corporate sector, civic organizations, educational institutions, and nonprofits. Interestingly, more than 95% of the leaders we approached immediately agreed to participate in these conversations designed to identify areas of strength and concern for St. Louis, and to discuss how Opera Theatre might use its unique resources to advance the region.

Many of the leaders we spoke with agreed that St. Louis' strengths include extraordinary institutions of higher learning, medical institutions that are among the best in the nation, and a thriving financial services sector. There was enthusiasm around the new opportunities that are taking hold in St. Louis – the growing entrepreneurial community with particular focus areas of agri-business, biomedicine, and cyber security, and the possibilities surrounding the new National Geospatial-Intelligence Agency campus under construction.

When asked about areas of concern for the community, area leaders repeatedly cited security and public safety, and the ongoing disparities that span economic development, K-12 education, and uneven access to healthcare. There is also a consistent perception that St. Louis lacks a strong plan for workforce development, and a sense that St. Louis trails other regions when it comes to progress focused on equity, diversity, and inclusion. The inability of the region to come together around shared goals – whether in government or business – remains an ongoing frustration.

When considering the role the arts play in our community, leaders cited the power of the arts to break down barriers and bring disparate populations together, and the belief that storytelling can be a powerful tool in healing. In the words of one leader, “Music is the great equalizer.” Several leaders feel that St. Louis underfunds its arts sector compared to similar regions. A few executives cited the power of partnership in the arts sector – something not seen frequently in other sectors – and felt that local arts organizations were demonstrating how collaboration can better society (the 2020 Arts United effort was cited as a specific example).

When asked about their perceptions of opera and Opera Theatre, one leader noted their perception that opera is “ancient,” but they viewed OTSL as a progressive organization. Several executives felt that Opera Theatre had embraced equity as a core value for many years, and that a commitment to inclusion was “part of OTSL’s DNA.” Many leaders appreciate the positive national attention Opera Theatre brings to St. Louis, applauding the Met premiere of *Fire Shut Up in My Bones* and other positive press.

One leader noted that opera – which brings together music with the power of the human voice – can move people more than any other art form. Combining the power of opera with a continued commitment to tell the stories of our time will ensure OTSL remains a valuable resource for St. Louis.

OTSL thanks the following for their time and participation in a Listening Session:

Michael Chivell, Armstrong Teasdale
Michelle Connell-Stevens, Focus St. Louis
Alison Ferring, Artist
Sam Fiorello, Cortex
Christy Gray, Whitaker Foundation
Andrew Martin, Washington University
Erika McConduit, Centene Corporation
Michael McMillan, Urban League
Rudy Nickens, Evolution
Kathy Osborn, Regional Business Council
Penny Pennington, Edward Jones
Kitty Ratcliffe, Explore St. Louis
Kathy Reeves, Enterprise Holdings
Michael Scully, PNC Bank
Christopher Tabourne, Enterprise Holdings
Keith Williamson, Centene Corporation

Participants

Opera Theatre is deeply grateful to the more than 230 individuals who participated, informed, and guided this strategic planning process across 2020 and 2021.

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*In Memoriam