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Report on an internship with the New Orleans Symphony

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REPORT ON INTERNSHIP WITH THE NEW ORLEANS SYMPHONY

A Paper

Submitted to the Graduate Faculty of the
University of New Orleans
in partial fulfillment of the
requirements for the degree of
Master of Arts

in

Arts Administration

by
Mark Huber
B.A., University of New Orleans, 1979
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Major Field: Arts Administration

Title of Thesis: Report On Internship With The New Orleans Symphony

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PREFACE

The information found in the following report is based on research, personal interviews, and my personal experience during a fifteen week internship with the New Orleans Symphony. The purposes of this report are to give a comprehensive picture of the New Orleans Symphony as a nonprofit arts organization, describe my activities during the internship, and demonstrate my approach to the various challenges presented during the internship.

The report begins with a profile of the organization outlining the Symphony's history, programs, goals, and the structure through which the Symphony operates and interfaces with its environment. It continues with descriptions of my experiences with the Symphony during the internship, analyses of various situations, including the major challenge of the internship, and recommendations based on these analyses. The report concludes with short and long term contributions made which were a result of the internship.

The historical information on the New Orleans Symphony found in this report was taken from a thesis entitled, A History of the New Orleans Philharmonic Symphony to 1944: The Founding of an Orchestra by Cintra Shober Austin, a chapter on the New Orleans Symphony by David Beveridge from the book, Symphony Orchestras of

the United States: Selected Profiles, and an article entitled, "A Brief History of the New Orleans Symphony" from a 1986-87 season New Orleans Symphony concert program. The information concerning the mission of the Symphony, board structure, and committees was taken from the current Articles of Incorporation and bylaws of the New Orleans Symphony. The information on staff positions in the Symphony came from personal interviews and job descriptions. All other material in this report, except where noted, was based on my personal experience during the internship.

INTRODUCTION

At the time of my internship, the New Orleans Symphony was experiencing severe financial problems to the degree of being on the brink of bankruptcy. Although these were bad times for the Symphony, I feel that the circumstances resulted in a more valuable internship. If the situation had been more stable, I would not have been able to observe the professionals on the staff respond to the myriad of problems which they faced. Furthermore, as a result of the Symphony's shortage of administrative personnel, I was able to take on more responsibilities, resulting in a gain of experience for myself and benefits for the Symphony.

The Symphony's continuing financial problems resulted in the staff having to work in a crisis environment most of the time. Long range plans and standard methods of operating within and among the departments were put by the wayside, by necessity, in order to solve immediate problems. This resulted in inefficiency in many instances and served to help perpetuate the Symphony's problems.

By the end of my internship, the Board appeared to have begun to address many of its long range problems. A financial recovery plan was drafted and plans were being made to modify the bylaws and staff structure. Due to these changes that were beginning to take place and the crisis situation at hand, the management structure

decribed in this report cannot be said to be an entirely accurate representation at this time. However, this description does outline many of the essential functions of the organization which are not likely to change.

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I. PROFILE OF THE NEW ORLEANS SYMPHONY

Brief History

The short-lived New Orleans Choral Symphony, founded in 1903, was the first major effort to organize a permanent symphony orchestra in New Orleans. The founders of this organization had hoped to widen New Orleans' music perspectives by making musical forms other than opera, dominant up to this time, available to the public. This organization, however, like several others to follow, folded after a brief existence due to lack of public and financial support.

Of a variety of local musical groups formed about this time, only one survived long enough to have a significant effect on the development of a permanent symphony orchestra. This was the Philharmonic Society, founded in 1906.

The Philharmonic Society was primarily concerned with bringing outside artists to New Orleans in order that audiences would have access to the very finest musical entertainment available. In fulfillment of its mission to "advance music in its highest form in New Orleans in whatever way possible," as stated in its charter, the Philharmonic Society also felt that it was extremely important to work towards the establishment of a local symphony orchestra.

The Philharmonic Society was unsuccessful in founding a permanent orchestra or supporting similar attempts by other parties

until 1936. It was in this year that Arthur Zack with the support of the Philharmonic Society was finally able to establish the first viable symphony orchestra in New Orleans.

Zack, a Russian immigrant, received most of his early musical training and experience in the New York area. In 1927, he was engaged by Fritz Reiner as a cellist for the Cincinnati Symphony Orchestra. Two years later, he founded and became the music director of the Cincinnati Civic Symphony, remaining with this organization until 1935.

It was through Zack's achievements with the Cincinnati Civic Symphony that he came to the attention of Mrs. Lucy Benjamin Lehmann, a New Orleans resident and devoted symphony supporter. In the fall of 1935, Zack was invited to New Orleans by Mrs. Lehmann in order to discuss the possibility of founding a permanent symphony orchestra. Zack was intrigued with the idea and immediately began to seek support for this latest project to build an orchestra.

Through his impressive organizational abilities, he was able to quickly obtain support for the project from socially prominent families, backers of previous attempts to found an orchestra, and the powerful Philharmonic Society. He was also able to round up a sufficient number of local instrumentalists for the orchestra who were all union members, an important first step toward the establishment of a fully-professional orchestra.

Consisting of 54 musicians of varying backgrounds and levels of ability, this new organization, the New Orleans Civic Symphony,

made its debut at the Municipal Auditorium on May 18, 1936. This concert was surprisingly successful, drawing an audience that numbered almost 3,000 and receiving favorable reviews.

Primarily through Zack's efforts, the Symphony was able to build on this successful beginning by securing additional support that would ensure the survival of the Symphony in future seasons. Zack established a support network consisting of women's auxiliary groups, local music organizations and businesses, small and large donors, public agencies, and an auxiliary group in Baton Rouge run by the governor's wife. Ties were also established with cities outside of Louisiana in the Gulf coast region.

In addition to Zack's abilities as an organizer and promoter, he was a master of programming, selecting works that emphasized the strengths of the orchestra while also making allowances for its weaknesses. The artistic quality of this orchestra, though not as high as the major orchestras around the country, continued to improve. Major guest artists began to appear with the Symphony. In later years, Zack continued to bring in major guest artists and performing groups.

Although Zack had made great gains in the establishment of a symphony orchestra, a number of persons began to become dissatisfied with his musicianship and frequent clashes with supporters. This dissatisfaction in addition to an event that was shortly to follow ultimately led to Zack's ousting as Music Director. The event was the formation of a rival orchestra named

the New Orleans Orchestra under the direction of the Norwegian, Ole Windingstad.

Rave reviews were given the first performances of the New Orleans Orchestra which consisted largely of the same musicians as those in the New Orleans Civic Symphony. Windingstad's successes and Zack's fall into disfavor led to Zack's replacement by Windingstad in 1940.

Under the leadership of Windingstad, the musical qualities of the Symphony improved. Financially, the orchestra also became more stable with the additional support of of the local business community. This support by local bussinesses, in addition to the continuing fundraising efforts of the Women's Auxiliary, ensured the orchestra's existence for years to come.

An additional occurrence that had a beneficial effect on the orchestra was the decision made by the Board of Directors in 1940 to import musicians from outside the New Orleans area to play in the orchestra. This allowed the Symphony to hire the best musicians available regardless of their geographic backgrounds. The name, New Orleans Civic Symphony, was subsequently changed to the New Orleans Symphony Association to reflect this expanded outlook of the orchestra.

During Windingstad's tenure, the Symphony continued to expand in size, budget, and numbers and types of programs. The increased budget enabled Windingstad to increase the number of subscription and youth concerts, establish a pops series, increase the number of

musicians to 70, continue the practice of featuring guest artists, increase rehearsal time, and hire a full-time business manager. The hiring of a business manager was significant in that the conductor was allowed to spend more of his time and energy on musical matters while the business manager worked on soliciting support and handling business affairs.

Massimo Freccia was hired as the new Music Director upon Windingstad's resignation in 1944. An important development during Freccia's directorship was the merging of the governing bodies of the Symphony and Philharmonic Society. The title of the orchestra was subsequently changed to the New Orleans Philharmonic Symphony, which was retained until 1984, when "Philharmonic" was dropped from the name.

Alexander Hilsberg, the former Associate conductor of the Philadelphia Orchestra, became the fourth Music Director of the orchestra in 1952. Throughout his directorship, he maintained close ties with the Philadelphia Orchestra, hiring young musicians that would frequently leave to become members of the Philadelphia Orchestra. Significant developments during Hilsberg's tenure included statewide radio and television broadcasts of performances, tours of Latin America and the Midwest, and a budget expansion into the American Symphony Orchestra League Major Orchestra category.

Due to an illness, Hilsberg was temporarily replaced with the Symphony's assistant conductor, James Yestadt, in 1961. Yestadt's tenure was brief, lasting for only two years.

In 1963, an uninterrupted period of musical leadership began with the employment of Werner Torkanowsky as Music Director. Important milestones for the Symphony attained during Torkanowsky's tenure were the Symphony's first commercial recordings, commissioning and performing of numerous world premieres, the receipt of several large grants for the establishment of an endowment, and the move to a new hall, the New Orleans Theater for the Performing Arts.

In 1977, Torkanowsky resigned, to be replaced with Leonard Slatkin, a previous guest conductor with the Symphony and Associate Conductor of the St. Louis Symphony. Slatkin was known for his imaginative programming, precise conducting technique, and audience rapport. His reputation enabled him to attract such brilliant performers as Van Cliburn, Misha Dichter, Itzhak Perlman, Emmanuel Ax, Jean-Pierre Rampal, and others. In 1979, Slatkin resigned to become Music Director of the St. Louis Symphony.

Philippe Entremont, an internationally famous pianist and conductor of the Vienna Chamber Orchestra, became the seventh conductor of the Symphony. Important developments during Entremont's tenure included the formation of the 100-member New Orleans Philharmonic Symphony Orchestra Chorus, critically successful tours of the East Coast, several Southern states, and Europe, and the move to the newly-renovated Orpheum Theater which was donated to the Symphony. Entremont resigned in 1986 to become Music Director of the Denver Symphony Orchestra.

Maxim Shostakovich, the son of Russian composer Dmitri Shostakovich, became the Symphony's new Music Director beginning with the 1986-87 season. He was first introduced to New Orleans audiences during the 1984-85 season in a guest appearance, leading the orchestra in his father's Fifth Symphony to much critical acclaim.

Programs

Currently, the Symphony performs over 120 concerts per year of various types. These include the Classical subscription series which forms the heart of the season, the new Basically Beethoven series, the Pops series, annual Holiday concerts, the Discovery series of family concerts, Young People's Concerts, and KinderKonzerts. Several rehearsals were also opened to the public for the first time this year as part of the Open Rehearsal Series.

The Classical subscription series is aimed primarily at the more musically knowledgeable audience, with works from the standard symphonic repertoire being programmed. On these programs, serious contemporary orchestral works by local or other composers are occasionally premiered and performed.

These concerts are the primary reason for the Symphony's existence and are also the most difficult to sell to a large audience. For this reason, the Pops, Discovery, Young People's, and KinderKonzerts are geared towards audience development with the

hope that these audiences will eventually develop a taste for the more sophisticated Classical series concerts.

The Pops concerts feature more popularly oriented "light" entertainment and are aimed at the older age groups who may not have developed an appreciation for the Classical programs. These concerts are usually better attended and more likely to have major corporate sponsorship, resulting in a more favorable income/expense ratio. Programs usually feature a popular guest artist or entertainer, or a smaller ensemble that plays a portion of the program without the Symphony.

A concert series entitled "Basically Beethoven" was tested for the first time during the 1986-87 season. This series generally consists of the most easily accessible classic orchestral works and is aimed at the young professional market. It was assumed that this audience would be interested in the Classical concert experience, but might not yet be able to fully appreciate the more complex works. This group's musical tastes are positioned somewhere between the tastes of the Classical concert audience and the those of the Pops concert audience. The concert experience is reinforced with after-concert receptions attended by the conductor.

The Discovery series of concerts is scheduled for Saturday performances making it convenient for entire families to attend. These concerts have programs aimed primarily at the six to twelve year old audience. As this age group generally has a limited attention span, programs and pieces are shorter and more

programmatic in nature. Orchestral works about animals, works that tell a story with a narrator, and works that demonstrate the various orchestral instruments are examples of pieces included on these programs.

These programs are almost identical to those in the Young People's concert series and KinderKonzerts with the exception that slightly longer pieces may be substituted in the Young People's Concerts as these are aimed at a high school level. KinderKonzerts and Young People's Concerts are attended exclusively by classes from local schools during the week. These concerts are subsidized to a large degree by the local school board.

A series of pre-concert lectures entitled Previews also serve an educational function. These lectures are given by local experts on Classical music and provide insight into the program of the evening. Occasionally, guest conductors, composers, or musicians participate in these lectures. Previews are also presented following the open rehearsals and on these occasions feature interviews of guest artists by the Resident Conductor.

The Open Rehearsal Series was designed to appeal primarily to senior citizens and other persons who are not able to attend evening performances. Admission to the rehearsals is at a reduced price, further increasing accessibility.

In addition to the above concerts, the Symphony performs a Classical subscription series of concerts in Mobile, Alabama, runout concerts, outdoor concerts, and numerous concerts for

special occasions. The Symphony also plays for performances of the New Orleans Opera and New Orleans City Ballet, and has several smaller ensembles which play in the New Orleans area. Many of these performances are recorded and broadcast on WWNO radio. Additionally, the Symphony also serves as a source of music faculty members for Dillard, Loyola, Tulane, and Xavier universities, the University of New Orleans, and the New Orleans Center for the Creative Arts.

Goals, Management Structure, and Funding

Goals

As stated in its articles of incorporation, the New Orleans Philharmonic Society's goals are to "organize and maintain a major symphony orchestra in the city of New Orleans, to give concerts in New Orleans and other places; to present in New Orleans and elsewhere celebrated artists in concert and in recitals; to advance the musical education of the youth of the city and in general to promote a public interest in and for the advancement of orchestral, instrumental, and vocal music in New Orleans and elsewhere". As evidenced in the activities described in the previous two sections of this report, the Society achieves all of its intended goals.

In addition to stating the purpose of the Society, the articles of incorporation outline the management structure of the Board of Directors, which serves as the governing body of this non-

profit Louisiana corporation. They also define the organization's activities within the guidelines required by the Internal Revenue Service for 501(c)(3) tax exempt status.

Management

The management of the New Orleans Symphony is two-tiered. The Board of Directors is the primary management structure which is ultimately responsible for all activities and the welfare of the Symphony. It sets long range policy and is active in raising funds in fulfillment of its responsibilities. The members of the Board of Directors are unpaid volunteers who hold positions of influence in local business and government, have relevant expertise and contacts, and/or have significant sums of money to make available to the Symphony.

The policies set by the Board of Directors are implemented by the staff members who handle most of the day-to-day business of the Symphony and are paid wages. The staff is separate from the Board of Directors and has no official input in the policy-making process.

Board of Directors

Article four of the articles of incorporation specifies the function and structure of the Board of Directors. It states that

the corporate powers and management of the corporation are to be vested in a board of Directors consisting of sixty members. In addition to the sixty members, four ex-officio members are, in effect, made a permanent part of the Board. These members are the Superintendent of Orleans Parish Public Schools, Superintendent of Catholic Parochial Schools, President of Local 174 American Federation of Musicians, and a member of the New Orleans City Council.

Twenty of the directors are elected annually at a general meeting of the membership. Terms are for three years. A member is defined as a person who has purchased a subscription for the current season. The staggering of terms provides continuity for the board and facilitates smooth transition of directors.

Regular meetings of the Board are held in May, September, November, January, and March on days determined by the president. Special meetings can be called by a majority of the directors or by the president. Any business can be transacted at special or regular board meetings. Only business brought before the membership can be transacted at a general membership meeting; members may not initiate new business. A quorum consists of twenty-five members for annual membership meetings and ten members for regular and special board meetings.

Officers of the Board of Directors are a Chairman of the Board, President, one or more Vice-Presidents, Secretary, Treasurer, and others that may be provided by the Board. They are

elected at the first meeting of the Board after the annual election of Directors, and hold office for one year, and until their successors have been elected and qualified.

The Chairman of the Board has ultimate responsibility for carrying out the purposes of the Corporation. The President is the chief executive officer of the Corporation, and presides at all meetings of the membership and Board of Directors.

Any Vice-President has the power to perform the duties of the President in his absence or inability to act. The President decides the order in which Vice-Presidents are to be called to perform his duties.

The Secretary keeps the minutes of the membership and Board of Directors meetings and gives notice of all meetings. The Secretary also performs other duties which may be assigned by the Board from time to time.

The Treasurer has custody of all funds and securities of the Society. He has the power to endorse all financial transactions of the Society and is accountable to any Director requesting information on any of the Society's finances. He also reports the financial condition of the corporation at each regular meeting of the Board of Directors.

The Music Director and Conductor has general supervision and control of all musical activities of the corporation, subject to the authority of the President, Board of Directors, or Executive Committee. He plans all programs, holds rehearsals, conducts the

orchestra during performances, and may be assigned additional duties by the Board of Directors.

Committees

The Society has several committees which are used to perform more specialized functions than the Board in a manageable fashion. Persons appointed to committees, with the exception of the committee chairperson, do not have to be members of the Board of Directors. In most cases, a person with expertise relevant to a particular committee is appointed to that committee. The President is an ex-officio member of all committees. Standing committees of the Society are the Executive, Finance, Publicity and Advertising, Program Advertising, Guest Soloist, Women's, Youth Concerts, and Maintenance Fund Committees.

The Executive Committee consists of between 10 and 17 members. All officers of the Society and chairpersons of the standing committees are members of the Executive Committee. Five members are considered a quorum at all Executive Committee meetings. Between Board meetings, any actions taken at an Executive Committee meeting constitute actions of the full Board. Executive Committee meetings can be called by the President, its chairperson, or a majority of its members. The immediate past president of the Society serves as a member of the Executive Committee.

The Finance Committee consists of between three to seven members appointed by the President. The Treasurer of the Corporation serves as the chairman of the Finance Committee. The Finance Committee prepares a budget for the corporation, considers all matters regarding the corporation's finances, makes financial reports to the Board at regular meetings, and makes recommendations concerning the prices of tickets and other financial policies of the corporation.

The Advertising and Publicity Committee consists of between five and seven members appointed by the President. This committee has general responsibility for all promotional advertising and keeping the Symphony before the public.

The Youth Concert Committee consists of between three and ten members appointed by the President. It performs duties delegated to it by the Board from time to time.

The Guest Soloist Committee is composed of between three and five members appointed by the President. This committee, in consultation with the Music Director, submits to the Board the names of not less than twice the number of soloists to be engaged in the succeeding season. The final determination of which soloists are selected is made by the Board of Directors.

The Program Advertising Committee is composed of from one to five persons appointed by the President. The function of this committee is to secure advertising for the Symphony's program.

The Women's Committee consists of an unspecified number of women who do not necessarily have membership in the Society. This Committee performs various functions as determined by the Board and miscellaneous volunteer work. The Chairperson and Vice-Chairperson of this committee are elected from the Board of Directors by the members of the committee.

The Maintenance Fund Committee consists of from six to twelve members appointed by the President. This committee is responsible for the planning and maintenance of an endowment. As no endowment currently exists, the committee is actively engaged in planning for a future endowment campaign.

Ad hoc committees are also appointed by the Board of Directors or Executive Committee. These are temporary committees formed for special needs which may arise from time to time.

It should be emphasized that the above information was taken from the bylaws of the Society and may not fully represent the present structure and operation of the Board. At the time of my internship, the Symphony was undergoing reorganization in several of these areas and several committees will probably be added, deleted, or their functions altered in the near future. In general, however, the above description serves to give a good idea of the issues addressed by the board and how they are resolved.

Staff

The staff of the Symphony is divided into four departments and the Executive Office. The four departments are Operations, Development, Marketing, and Finance and Administration.

The Executive Office consists of the Executive Director and the Executive Secretary. The primary responsibility of the Executive Director is to carry out policies set by the Board of Directors. In this capacity, the Executive Director plans, supervises, coordinates and executes all of the Symphony's activities. More specific duties and responsibilities include the planning and scheduling of the Symphony's programs in conjunction with the Music Director; management, supervision, hiring, and firing of staff personnel; negotiation of all labor agreements and contracts; working with the Board and Development Director in fundraising; development of annual operating budgets; liaison with the Board, volunteer organizations, the press, funding organizations, and other outside organizations; and numerous other activities related to the overall responsibility of directing the business affairs of the Symphony. The Executive Director reports to the Board of Directors.

The Executive Secretary is responsible to the Executive Director for routine clerical work and general office functions. More specific duties and responsibilities include preparation of correspondence, dictation, typing, and maintenance of the Executive

Director's calendar; receptionist for incoming calls to the Executive Director; maintenance of files; assisting other staff personnel with clerical duties when needed; and assisting the Board secretary with notification of Board members for meetings, taking of minutes, etc. The Executive Secretary reports to the Executive Director.

The Operations Department consists of the Orchestra Manager, Personnel Manager, Librarian, Technical Director, Engineer, House Manager, Stage Manager, Custodian, and temporary or part time employees such as ushers and stage hands.

The Orchestra Manager is responsible for coordination of all details related to the production of concerts, the operation and maintenance of the Orpheum Theater, and management and supervision of the Operations staff personnel. Specific duties and responsibilities include liaison with guest artists and preparation of itineraries, preparation and distribution of the Symphony's master calendar and schedules, liaison with artist managements during the contracting process and in follow-up details, logistics planning for runout concerts and tours, serving as the Symphony's representative for Symphony services, planning and monitoring budgets for the Operations Department, management and supervision of Operations staff personnel, and other duties as assigned by the Executive Director. The Orchestra Manager reports to the Executive Director.

The Personnel Manager coordinates the orchestra personnel activities, enforces regulations in the American Federation of Musicians Master Labor Agreement, and serves as point of contact for all matters involving the well-being of orchestra members. Specific duties and responsibilities include contracting extra and substitute musicians, keeping attendance records, assisting Finance in the preparation of the orchestra payroll, coordination of auditions, communicating logistics needs of musicians to the Orchestra Manager, and other duties which may be assigned by the Orchestra Manager. The Personnel Manager reports to the Orchestra Manager.

The Librarian has overall responsibility for maintaining the orchestra and chorus library. Specific duties and responsibilities include procurement and preparation of all scores, parts and other music; maintenance of a current file of publisher catalogues and information on availability and cost of music to be ordered; receipt and return of ordered materials; cataloging of music purchased for the library; maintenance, distribution, and collection of orchestra folders; bowing of parts; providing of instrumentation information to the Music Director and Orchestra Manager; and other library related functions as assigned by the Orchestra Manager. The Librarian reports to the Orchestra Manager.

The Technical Director has overall responsibility for all theatrical and stagecraft work and equipment within the Orpheum Theater. Specific duties and responsibilities include the planning

and execution of all technical aspects for all events in the Orpheum Theater, maintenance and procurement of theatrical equipment, determination for need and operation of sound systems, lighting design and operation, obtaining and supervision of required stagehands, monitoring of the technical budget, and other duties as may be assigned by the Orchestra Manager. The Technical Director reports to the Orchestra Manager.

The Engineer is responsible for the operation and maintenance of the Orpheum Theater's air conditioning and heating systems, electrical systems, plumbing, and house lighting; adherence to all local ordinances; and the overall cleaning and maintenance of the building. The Engineer reports to the House Manager.

The House Manager has overall responsibility for the maintenance, availability, and operation of the Orpheum Theater. Additional duties and responsibilities include coordination of Orpheum rental procedures with other organizations wishing to use the theater; supervision of the Head Usher, Engineer, and Custodian, and concessions subcontractors; preparation and monitoring of the Orpheum budget; order and receipt of supplies; keeping an inventory of all supplies and records for all Orpheum expenses; and other duties as may be assigned by the Orchestra Manager. The House Manager reports to the Orchestra Manager.

The Stage Manager has overall responsibility for all aspects of concert production relative to the physical set-up of the orchestra. Specific duties and responsibilities include set-up of

the stage for rehearsals and performances; coordinating with the Technical Director in the arrangement of required equipment and efficient use of stagehands; arrangements for moving of instruments and equipment to remote concert sites; care, maintenance, and repair of all instruments owned by the Symphony; adherence to stage set-up requirements specified in the Master Agreement; and other duties as may be assigned by the Orchestra Manager. The Stage Manager reports to the Orchestra Manager.

The custodian has overall responsibility for the general housekeeping and maintenance of the theater. Specific duties and responsibilities include trash removal, cleaning, inspection and replacement of burned out light bulbs in the house, installation of marquee copy and three-sheet posters, light repairs as directed by the Engineer, and other duties as may be assigned by the House Manager. The Custodian reports to the House Manager.

The Development Department consists of a Director, Assistant Director, Records Specialist, Campaign Assistant, and Secretary.

The Development Director has overall responsibility for planning and implementing programs required to generate supplemental income for the Symphony. These programs include the Annual Fund, corporate sponsorship, endowment campaigns, deferred giving, and foundation and public agency grants. Responsibilities and duties include working with and making effective use of members of the Board of Directors in fundraising campaigns; providing the Board of Directors with back-up materials and guidance in

fundraising matters; evaluation of fundraising potential and prospects; preparation of the case statement to be used in the Annual Fund campaign; planning of special fundraising events; maintaining and cultivating contacts with major donors and prospects, foundations, corporations, and public agencies; supervising and managing the Development staff; preparation and monitoring of the departmental budget; and other duties which may be assigned by the Executive Director. The Development Director reports to the Executive Director.

The Assistant Development Director provides administrative support for all fundraising activities and assists the Development Director in all areas. Specific duties include research on foundation, corporate, and individual prospects; preparation of grant proposals; grants administration; coordination of special events; preparation of periodic reports; coordination of direct mail campaigns; coordination of data processing needs; and other duties as may be assigned by the Development Director. The Assistant Development Director reports to the Development Director.

The Records Specialist assists the Development Director in maintenance of records in the Development Department's computer system. Specific duties include entering of donor and pledge information into the computer; maintaining mailing lists; generating reports from the data base; operating the computer to produce personalized letters used in direct mail campaigns; and other duties as may be assigned by the Development Director. The

Records Specialist reports to the Development Director.

The Campaign Assistant is responsible for processing and keeping records on all pledges and contributions, generating weekly financial reports, ensuring that donors receive promised benefits, assisting in preparation of direct mail pieces for mailing, and performing other duties as may be assigned by the Development Director. The Campaign Assistant reports to the Development Director.

The Secretary provides clerical assistance to the Development Director. Specific duties include typing of correspondence and grants applications; maintenance of all Development Department files; receptionist duties; and other duties as may be assigned by the Development Director. The Secretary reports to the Development Director.

The Marketing Department consists of a Director, Public Relations/Media Manager, Public Relations/Media Associate, Group Sales Manager, Educational Director, Customer Service Manager, Associate Customer Service Manager, several Customer Service Representatives, Telemarketing Manager, Assistant Telemarketing Manager, and numerous part-time Telemarketers.

The Marketing Director is responsible for developing and implementing plans to secure earned income through ticket sales and projecting the desired image of the Symphony to the general public. Specific duties and responsibilities include development and implementation of all long and short range marketing plans, and

public relations and ticket strategies in conjunction with the Executive Director and appropriate Board Committees; preparation and monitoring of the departmental budget; forecasting and monitoring of earned income; development of all publications to be distributed to the Symphony audience members; working with the Development Director and appropriate Board committees in promoting the Symphony's fundraising events; and other duties as may be assigned by the Executive Director. The Marketing Director reports to the Executive Director.

The Public Relations/Media Manager provides expertise in the area of mass and selective communication and promotion, and plans and implements a continuous community awareness program designed to build credibility and improve the organization's image with various publics. Specific duties include regular liaison with all pertinent media, development of news and feature material for the media, control of release of sensitive information, continual monitoring of the system of communication between the Symphony and its publics, prioritizes requests for services within the organization, liaison with advertising agencies, and other duties as may be assigned by the Marketing Director. The Public Relations/Media Director reports to the Marketing Director and works closely with the Executive Director.

The Public Relations/Media Associate assists the Public Relations/Media Director in all responsibilities and is primarily responsible for development of the concert programs books,

individual concert publicity, newspaper advertising, press releases, and other duties as assigned by the Public Relations/Media Director. The Public Relations/Media Associate reports to the Public Relations/Media Director.

The Sales Manager is responsible for planning and implementing strategies for group sales of Symphony subscriptions to corporations; professional and civic associations; educational, community, religious, and senior groups; and hotels, convention centers and convention groups. Specific duties include identifying leads; making sales calls and presentations; maintaining contact with clients and developing packages for their particular needs; and other duties as may be assigned by the Marketing Director. The Sales Manager reports to the Marketing Director.

The Educational Director, in collaboration with the Music Director and Marketing Director, coordinates the development and marketing of audience development programs from preschool ages through adult. Specific duties and responsibilities include liaison with supervisors of local school boards and teachers; coordination of schedule of educational programs in cooperation with the Orchestra Manager; development and distribution of publicity materials for these programs; research into possible educational programs; and other duties as may be assigned by the Marketing Director. The Educational Coordinator reports to the Marketing Director and works closely with the appropriate Board Committees.

The Customer Service Manager develops, implements, and supervises procedures needed to provide ticket/subscription services to the Symphony's customers. Specific duties include coordination of renewals and subscription ticket sales, coordination of single ticket sales, supervision of all Customer Service Representatives and the operation of the box office, providing ticket sales progress reports and final sales reports, coordination of the Marketing Department computer data base and the TicketMaster computer operations and other duties as may be assigned by the Marketing Director. The Customer Service Manager reports to the Marketing Director.

The Associate Customer Service Manager assists the Customer Service Manager in supervision and training of the Customer Service Staff and other duties of the Customer Service Manager. The Associate Customer Service Manager also serves as a Customer Service Representative and reports to the Customer Service Manager.

The Customer Service Representatives are responsible for processing computerized renewals and orders for the various subscription series, taking telephone orders, assisting customers with problems in ticket purchases, and preparing box office statements/final sales reports. The Customer Service Representatives report to the Customer Service Manager.

The Telemarketing Manager has overall responsibility for the telemarketing operations of the Symphony, working closely with the Development Director and Marketing Director. Specific duties and

responsibilities include training and supervision of the Telemarketing staff, development of scripts to be used during telephone solicitation for subscriptions and contributions; generation of weekly and monthly sales reports; and other duties as may be assigned by the Development Director and Marketing Director. The Telemarketing Director reports to the Marketing Director.

The Assistant Telemarketing Director assists in all the duties of the Telemarketing Director; serves as a Telemarketer, and performs other duties as may be assigned by the Telemarketing Director. The Assistant Telemarketing Director reports to the Telemarketing Director.

The Telemarketers are part time employees who sell subscriptions and solicit contributions over the telephone using prepared scripts and provided lists of telephone numbers. They work primarily on commission and are paid small supplementary wages. The Telemarketers report to the Telemarketing Director.

The Finance Department consists of a Director, Bookkeeper, Office Manager, and Secretary/Receptionist. The Secretary/Receptionist is placed in this department only for sake of convenience as this position serves all of the Departments.

The Director of Finance is responsible for all financial matters of the Symphony, subject to the direction of the Executive Director and appropriate Board Committee. Specific duties and responsibilities include maintenance of a chart of accounts, accounting system, and purchase order system; cash management;

approval and issuance of checks for payment of creditors; preparation of an annual budget for the entire Symphony; financial reporting on a monthly basis and as required; preparation of the Symphony's payroll; adherence to local, state, and federal reporting requirements and personnel regulations; preparation of materials for the annual audit; periodic cash flow analysis; supervision of the Finance staff; and other duties as may be assigned by the Executive Director.

The Director of Finance reports to the Executive Director.

The Bookkeeper is responsible for tracking income and expenses and maintaining cash receipts and disbursements journals and ledgers, a sales journal, and an accounts payable and deposits ledger; preparation of the weekly payroll; and other duties as may be assigned by the Director of Finance. The Bookkeeper reports to the Director of Finance.

The Office Manager is responsible for the ordering and inventory of supplies; maintenance of the petty cash fund; coordination of repairs of all office equipment; and other duties as may be assigned by the Director of Finance. The Office Manager reports to the Director of Finance.

The Secretary/Receptionist provides services as a receptionist for all departments, forwarding calls or taking messages as required. Additional duties include miscellaneous clerical support, and other tasks as may be assigned by the Director of

Operations. The Secretary and Receptionist reports to the Director of Finance and works closely with other staff members.

Funding

Funding sources for the Symphony can be broken into the general categories of earned and supplemental income. In the earned income category, major revenue sources are subscription and single ticket sales, contractual fees for services (private sector), and tax supported grants for specific services.

From 1979 to 1984, earned income from subscriptions and ticket sales, and contractual fees has averaged approximately 30% of total income. This is the largest category of earned income. It is also heavily dependent on marketing activities. Because the New Orleans Symphony's ratio of earned income to total income was less than that of the average major symphony orchestra for this period, efforts were made recently to strongly increase marketing efforts.

Contractual fees come mainly from organizations such as the New Orleans Opera, New Orleans City Ballet, and private businesses for special performances. Fees paid by the Opera and Ballet typically do not cover the entire expense of an orchestra performance. For the Opera or Ballet to pay the full expense of orchestra performances in support of their programs would be a severe financial burden for these two organizations. For this reason, negotiation of contracts between the Symphony and these

organizations is complex. Opportunities for special performances underwritten by local businesses are continually sought; however, strong consideration is given to the nature of these performances in relation to the goals of the Symphony.

Examples of tax-supported grants for Symphony performances are grants provided by the state for subsidization of educational concerts for children. These grants made up approximately 18% of the Symphony's income for the years 1979-84, but have been decreasing recently.

In the supplemental income category, major revenue sources are tax-supported grants/allocations, individuals, private foundations, businesses, and fundraising events organized by auxiliary groups. Supplemental income made up approximately 46% of total income for the years 1979-84. All income in this category is raised through the efforts of the Development Department.

Tax-supported grants/allocations made up approximately 16% of total income during this period. Grants in this category come from local, state, and federal sources. No specific services are required under these grants which are usually classified as general operating funds. Grants from the state and federal levels have been decreasing in recent years.

Contributions from individuals made up approximately 11% of all income for the period 1979-84. These contributions are solicited personally, through direct mail campaigns, or telethons.

Foundation grants made up approximately 3% of all income during this period. Foundations are usually solicited in person with follow-up applications being made after initial discussions. Many contacts with foundations and businesses are made through the Board of Directors.

Businesses contributed approximately 8% of total income during the years 1979-84. The primary form of support in this category is the corporate sponsorship. In return for sponsoring a concert for a specified sum, a corporation receives recognition in all Symphony publicity for that particular concert. This is frequently used as a marketing tool by corporations. The Symphony is currently making strong efforts to increase corporate sponsorships to make up for decreasing public funding.

Fundraising activities by auxiliary groups such as the Women's Committee made up approximately 5% of all income in during the period 1979-84. Examples of fundraising events are the Symphony Book Fair, Opus Ball, and benefit concerts.

II. INTERNSHIP SUMMARY

My internship with the New Orleans Symphony consisted of a variety of projects in the Operations, Marketing, and Development Departments as well as general assistance to the Orchestra Manager and Development Director in their day-to-day activities. The greater part of the internship was spent in the Operations Department, with the Orchestra Manager serving as my initial on-site supervisor. Upon the resignation of the Orchestra Manager late in the internship, my responsibilities were shifted to the Development Department, with the Development Director taking over as my on-site supervisor. Between my activities in the Operations and Development Departments, I spent two weeks as a customer service representative in the Marketing Department.

The activities in which I ultimately became involved varied to a large degree from those stated in my original internship proposal. These variations were a result of the unforeseen changes and shifts in priorities that had taken place within the Symphony between the time my proposal was written and when my internship began.

Of the nine responsibilities or projects stated in the proposal, only three were carried out as originally intended. The others were substituted with what I feel were equally worthwhile projects.

Most of the projects in which I was involved were assigned by the on-site supervisors during periodic meetings. Two projects in the Development Department, however, were begun on my own initiative. These were the preparation of a grant proposal to a foundation and research into potential fundraising events. Following is a summary of my activities during the internship.

Weeks One to Three

My first three weeks consisted of several smaller projects such as drafting of job descriptions for positions in the Operations Department, contract detailing, design and implementation of a backstage security system for the Orpheum Theater, updating and mailing of orchestra schedules, and familiarization with the DOS and WordPerfect computer software used by the Symphony.

Job Descriptions

The largest of the smaller projects was the drafting of job descriptions. My methodology for this project consisted of writing letters to several symphony orchestras of similar budget size to the New Orleans Symphony (determined by using a report published by the American Symphony Orchestra League²) requesting sample job descriptions and organizational charts. Using these sample job

descriptions, as well as procedures from several personnel management texts³ on writing job descriptions, and taking into account the unique requirements of the New Orleans Symphony, I drafted job descriptions for all of the "exempt"⁴ employees in the Operations Department. These "exempt" employees included the Personnel Manager, Stage Manager, Technical Director, Orpheum Manager, and Librarian. The draft job descriptions were subsequently modified and used by the Orchestra Manager in employment contracts for several of these personnel.

Contract Detailing

My involvement with contract detailing began with a checklist drafted previously by the Orchestra Manager and myself (please refer to appendix A). This checklist served as a guide and indication of the status of a particular contract.

The contracts to be detailed were between the New Orleans Symphony Orchestra and guest artists and conductors for all of the concerts in the current season. These contracts were in various stages of completion and required the cooperation of persons in several departments in order for them to be completed. A summary of the process is as follows:

After a guest artist or conductor had been decided upon earlier by the Executive Director and Music Director (with input from the Marketing Director and Orchestra Manager), the artist's

management was contacted by telephone by the Executive Director to discuss availability, fees, repertoire, and other details. After tentative verbal agreements had been made, the artist's management mailed a multi-copy contract to the Symphony which had been signed by the artist's agent. The contract included information such as dates of performances, number of rehearsals, repertoire, and publicity requirements. Occasionally, technical riders were included. The various details were checked for accuracy and acceptability against given information and requirements for publicity materials from the artist were determined. Any discrepancies were brought to the attention of the Orchestra Manager who would contact the artist's management to discuss changes. If additional publicity information was required, I filled out the request forms which accompanied the contracts. Once the contracts had been detailed and any modifications made by the Orchestra Manager or Executive Director, they were signed by one of these persons and a copy was returned to the artist's management.

One of my additional responsibilities in this process was to check on the status of all guest artist contracts (with artists appearing in the nearest concerts receiving highest priority) and to ensure that they had been detailed, signed, additional requirements determined, and returned to the artist's management.

Orpheum Theater Security Procedures

The need for a backstage security system for the Orpheum Theater had originally been brought to light by the theft of recording equipment from one of the backstage dressing rooms. Access to the backstage area up to this time had been fairly open with little control over who was admitted backstage. Part of the problem was that even though security guards were available, they were unable to recognize all Symphony employees. Additionally, doors leading to backstage areas were frequently left unlocked.

During a Development staff meeting, these problems were discussed and it was decided that I would design and have produced, permanent photo-identification cards for all Symphony personnel and temporary cards for all part time stage personnel. Before these cards were distributed, however, I would draft a list of security procedures which would describe how the cards were to be used, and which entrances were to be used by Symphony personnel. These entrances would be guarded during the specified times they were to be kept open, and kept locked at all other times. Persons would be denied access who did not present the appropriate identification.

I investigated several ways of producing the identification cards. Initially, I contacted several local universities about the possibility of letting the Symphony have the use of their photo-identification card machines free of charge. I received positive responses from two of these universities; however, the conditions

that they imposed would have made this option impractical. In both instances, the machines would have had to have been used on campus. Having all Symphony personnel report to a university campus on a particular day to have the cards made would have imposed a logistics problem which would have offset any potential cost savings. This option was subsequently dropped.

My next idea was to improvise a method of making photo-identification cards in-house by using a Polaroid camera for photographs which could be trimmed and pasted onto cards. The film would be donated by a local store and a Polaroid camera was available for use from one of the Symphony staff members. This idea was also ruled out as being impractical as reliance would have to be placed on a particular staff member to furnish the camera for all identification cards made in the future.

Ultimately, it was decided to delete the requirement for a photograph on the cards and make the cards difficult to reproduce by impressing the Symphony's seal on each one. I designed the master for the card using the logo and typestyle from the Symphony's stationery (please refer to appendix B). This master was then gang printed in black ink onto sheets of white card stock which were then cut into the required quantity of cards.

Three variations of the identification card were made. One identified the holder as a staff member, the second as an orchestra member, and the third as stage crew. Temporary stage hands would use the stage crew cards with the word, "TEMPORARY" stamped on the

front and an expiration time and date on the back. A space was provided for a signature on the bottom of each card.

Before the identification cards could be distributed, the security procedures had to be formalized. Through discussions with the Orpheum Manager, Stage Manager, Personnel Manager, Technical Director, and Orchestra Manager, I was able to get various perspectives on the security needs of the Orpheum. I then drafted a list of procedures which incorporated suggestions from all of the above persons and submitted this to the Orchestra Manager. After final revisions, copies of the procedures were made to distribute to all Symphony employees along with the identification cards (please refer to appendix C).

Update and Mailing of Orchestra Schedules

During this initial three week period, I was also involved with the updating of the orchestra's master schedule. Throughout the Symphony's season, updates were made to rehearsal and performance times, dates, and locations; names of guest artists and conductors; and repertoire. Periodically, the quantity of changes reached the point at which it was necessary to send out revised orchestra schedules to all persons who had reason to know this information. Persons requiring this information included orchestra members, the local newspaper, other arts organizations in the city,

the facility managers at the Theater for the Performing Arts, and others.

I was responsible for entering all changes into the computer which stored the master schedule and, when directed, obtaining a printout which was to be copied and mailed to all persons on the schedule mailing list. This was a sizeable project as the schedule had numerous pages and had to be mailed to several hundred persons.

Eventually, this procedure was made more efficient by announcements of future changes being made in the form of change transmittals. These transmittals instructed what changes were to be made on the schedule and were sent to all persons on the mailing list who had received earlier schedules.

Familiarization with Computer System

Throughout this period I was also gaining a functional knowledge of the WordPerfect and DOS computer software used by the Symphony. This was done through occasional lessons given by the Orchestra Manager, time on the computer during miscellaneous projects, experimentation, reading the manuals, and using the "help" function.

Use of the computer in various projects, I found, could either save or waste time. Initially, memos and reports done on the computer took longer than they would have on a regular typewriter. However, once I became more familiar with the software and the uses

for which it was best suited, I was able to use it more effectively. Short memos and one time letters were just as easily done on the typewriter as on the computer, for example. However, major documents such as the orchestra schedule, and many letters with similar bodies but variations in salutations or small details were best done on the computer. Efficient use of the computer was especially important when several persons were using the same machine and computer time became scarce.

Weeks Four to Eight

During this period I was involved primarily with the major challenge of the internship as described in part IV of this report. Additional activities during this period included assisting with the mailing of subscription tickets, finishing the production of the identification cards, and assisting in errands related to the production of concerts.

Weeks Nine to Ten

During this period, I worked in the customer service division of the Marketing Department and briefly in the orchestra library. Duties in customer service included familiarizing myself with all of the subscription packages and other products in the subscription brochure, learning how to operate the Ticketmaster computer

terminal, learning the ticket ordering and accounting procedures, and functioning as a customer service representative.

In spite of thorough reading of the brochure before going to work in customer service, I was not prepared for many of the requests made by customers. I would estimate that approximately two thirds of the many calls I received concerned complaints that customers' tickets had not been received. The standard procedure for these problems was that we would first check the Ticketmaster computer file to find out the status of the account. If everything appeared to be in order in the computer, the paperwork would then have to be tracked down. This was often difficult as the paperwork could have been in one of five offices at the Symphony undergoing various stages of processing. In the majority of these cases, the problem turned out to be that Ticketmaster had not released the tickets as the Symphony was behind payments on its account. Also, mailings of tickets were frequently delayed due to the Symphony's lack of funds to pay for postage. In situations where it appeared that tickets would not arrive in time for a concert, duplicate tickets had to be made for customers which were to be picked up at the box office on the night of the performance.

The job in customer service was also made unnecessarily difficult by the complexity of the subscription packages and the subscription brochure. Many persons called customer service merely to be assisted in understanding the brochure.

The accounting system for ticket orders was also complex and unwieldy. In the case of telemarketing orders, the order processing operation took place in five different rooms with no quick way of determining exactly where the order was at any particular time. Several weeks would elapse between the time an order was made and the time it was filled.

In theory, the Ticketmaster system was to have greatly improved the accounting of ticket orders, provided additional sales outlets, and provided greater detailed information on subscribers which could be used in future marketing and development efforts. None of these benefits resulted (with the exception of additional sales outlets), however, due to a complex system which was more vulnerable to disruption and left the Symphony fewer options for crisis control. Without going into an analysis that would be beyond the scope of this summary, the best solution to these problems would appear to have been to cut back drastically on complexity in all aspects of the ticket marketing process. This would have resulted in manpower savings and better service to ticket buyers.

Library

Activities in the orchestra library included bowing of orchestra parts under supervision of the Librarian, updating of Orchestra Library Information System catalogue cards with

information from change transmittals sent by the American Symphony Orchestra League, and interviewing the Librarian on his job duties and responsibilities.

The Orchestra Library Information System cards were used to keep track of what orchestral works (and versions of works) the Symphony had in its permanent library, what instruments were required for a particular work, which publishers currently had a particular work in their inventories, and any special requirements for a particular piece. The system, recently devised by the American Symphony Orchestra League, had errors that would be occasionally spotted by orchestra librarians and proofreaders. It also required that publisher information be updated periodically.

Whenever changes were required on the cards for these or other reasons, change transmittal letters would be sent by ASOL to owners of OLIS catalogues. The changes were then to be made on the catalogue cards. This was one of my brief responsibilities in the library. The other responsibility involved bowing of parts.

Essentially, bowing of orchestral parts entails marking all string parts with either up or down bow markings (based on the section leaders' parts) so that all bows move in the same direction at the same time during a concert. This gives a more pleasing visual effect and can also have a bearing on the phrasing of the music. Any other special marks specified by the section leader are also transferred to the parts in that section.

Weeks Eleven to Fourteen

This period of my internship was spent in the Development Department. During my initial meeting with the Development Director, I was given several assignments. These included research into the capabilities and utilization of the computer system used in Development and providing the Development Director with a brief on the results, performing foundation research, and compiling a report on the status of foundation contributions. Two additional projects which I later took upon myself with the Development Director's approval were the writing of a foundation grant proposal and research into potential fundraising events for the Symphony.

Development Department Computer System

The Development Director requested that I research the capabilities and utilization of the Development Department's computer as he was not familiar with it and was not satisfied with its report-generating capabilities. Not having sufficient time to learn the entire system in detail at this point in the internship, I asked the operator of the system to give me demonstrations of input and retrieval of information and report generation. I gained additional insight into the system by cursorily reading through the operating manuals.

The system, an IBM Display Write, had been purchased by the Symphony approximately ten years prior. The software combined

word processing and and database handling capabilities. It was used to generate personalized direct mail pieces (using the merge function) and keep track of contributions from all sources.

As utilized, the only information available from the database was the name and address of contributors, how much they had given, and when the contributions had been made. The storage of more detailed information and its selective retrieval could have been accomplished with this system, though the operators were unable to make full use of these capabilities.

As the software was not specifically designed for fundraising, the menus appearing on the screen were general in nature, with an in-depth knowledge of the software required to make use of its full potential as a fundraising tool. This appeared to be the greatest problem with the system-- not that it was incapable, but that it was fairly complex, necessitating a well-trained operator. The operator in this instance had only minimal training.

The main problem with the hardware and software was that it was incompatible with the other hardware and software in use at the Symphony. Data could not be transferred between the different systems in the different departments very easily and all development data was accessible only through one keyboard. Additionally, valuable data on subscribers from Marketing was not available for use in development efforts as this information was stored in the Ticketmaster computer which was also incompatible with the Development computer.

Transfer of subscriber information was possible, however, through a data transfer service. This required Ticketmaster to provide its tapes of information to the data transfer service. The service would then transfer the data into a format and medium compatible with the Symphony's IBM Display Write system. This method was expensive and inefficient in that the information available to Development would never be completely current.

The use of both computers separately by Development was also problematic. Although the Ticketmaster terminal did have the capacity to print labels for Development's direct mail campaign, the use of these labels in combination with labels generated by Development's computer in a direct mail campaign would have resulted in many duplications being mailed as no merge/purge of the lists was possible in-house.

In summary, the major problems with the computer system in Development appeared to be complexity, incompatibility, and inadequate training of the operators. Information gained in this research was ultimately used in the grant proposal to the Frost Foundation for a new computer system for the Development Department.

Foundation Research

My next project involved research on foundations. More specifically, I was instructed to look for national foundations

which could provide funding for capital projects and/or administrative development. The objective was to find a foundation which could provide a grant for a new computer system for the Development Department.

As a first step in my research, I designed a foundation information file form which would be used to record information collected and serve as future reference. Information recorded on these forms included the name of the foundation, source of information, points of contact, address, financial information, types of grants given, etc. (please refer to appendix D). Primary reference sources were several publications published by the Foundation Center including The National Data Book, The Foundation Directory, Source Book Profiles, and Foundation Grants Index. All of these references were available in the Foundation Center in the New Orleans Public Library where I performed most of my research.

My methodology began by using the indexes in the Foundation Grants Index and National Data Book to find foundations that funded capital projects and/or administrative development projects. I then refined the choices to those that also gave to arts organizations, organizations in Louisiana, and those that gave grants of sufficient size for the proposed system using information from the Foundation Directory and Source Book Profiles. Approximately twelve foundations fitting these criteria were selected.

Noticing that one of these foundations fit all of the criteria especially well and had a submission deadline coming up shortly, I suggested to the Development Director that I begin writing a proposal to this foundation. He agreed with this suggestion.

In order to become more familiar with this foundation's proposal procedures, I called the foundation to request an annual report and any guidelines that were available. The guidelines received as a result of this call were followed closely in the writing of the proposal. Letters were sent to other prospective foundations requesting annual reports and guidelines.

Ideally, personal meetings should be made with the representatives of a foundation before submitting a proposal whenever possible. In this case, however, a personal phone call was made to the director of the foundation by the Development Director, as the foundation was located in Colorado. In this phone call, such details as the fundability of the project and the Symphony, amount to be requested, condition of the Symphony, and need for the system were discussed. A copy of this proposal is included in appendix E.

Fundraising Event Research

About the time of completion of this project, I attended a fundraising event at the Orpheum Theater given to benefit the Symphony. A local popular music ensemble, "The New Leviathan

Oriental Foxtrot Orchestra," had donated its services for the occasion.

As the time between when the decision had been made to allow this event and the actual date of the concert was less than three weeks, very little publicity had been possible. Even though the Symphony management had been aware of potential problems with publicity resulting from such short notice, a decision was made not to delay the performance. As most of the staff had feared and expected, audience turnout for the concert was very poor, probably due to the scarce publicity and high ticket prices.

This failure inspired me to propose the production of a more ambitious event with longer lead time for planning publicity, a more popular combination of local musicians, and a more carefully thought-out ticket pricing structure. I also felt that the chances were good that several of the musicians I had in mind would probably be willing to donate their services, as they had performed for similar events in the past, and this would be a cause worthy of their support. The musicians I had in mind were Allen Toussaint, Ellis and Wynton Marsalis, and other local rhythm and blues artists. After being given the go-ahead by the Development Director, I began research into publicity methods for the event, optimum ticket pricing, and logistics.

I first met with the Symphony Publicity Director to solicit her support for the project and discuss ideas for publicity. She seemed to like the idea but expressed reservations on sufficient

manpower being available on the Symphony staff to produce the event. As I was most interested in determining what the theoretical requirements would be for such an event at this point, I was not deterred by these reservations and continued my research.

In our meeting, we discussed which audience would be most likely to attend such an event and how it could best be reached. It was agreed that the audience would probably not be the older, affluent audience that usually attended Symphony concerts, but the younger crowd that frequented the city's music clubs.

This segment usually finds out what is happening in the city's music clubs through certain publications, posters in various locations around the city, and radio stations. I felt that the most effective way for publicizing this event, therefore, would have been to buy paid ads in these publications and having posters and flyers printed and posted in similar locations as those posted by the music clubs. The ads and posters would be similar in style to those used by the music clubs. Radio stations used by these clubs (as well as the stations normally used by the Symphony) would also be used for the Symphony's ads for this event. Other considerations for the fundraising event were Orpheum Theater front-of-house personnel, sound systems, and transportation for out-of-town musicians.

A list of front-of-house personnel and sound system requirements from a recent Ellis Marsalis concert at the Orpheum

was obtained from the House Manager. This information was used as a basis for establishing production expenses.

It was anticipated that transportation expenses for out-of-state musicians could be avoided by exchanging a block of seats for the concert and/or advertising in the program for several round trip tickets with a local airline. The chances seemed good for this possibility as one particular airline had provided transportation for guest artists previously in exchange for concert tickets.

A listing of total expenses for the benefit was compiled using the production expenses from the Marsalis concert and an estimate of publicity expenses based on the conversation with the Publicity Director.

After all expenses were determined, a ticket pricing structure was devised based on a modified classical concert ticket pricing structure. The small number of expensive seats in Dress Circle were raised in price to \$50 for those persons who were feeling especially charitable (such as Symphony Board members). Even though it was felt that there would always be a few buyers in this category, most ticket sales were anticipated to be made to persons who were more interested in listening to the music than supporting the Symphony. The number of lower price tickets was increased as it was felt that most persons in the target audience would not pay much beyond this price. These tickets were priced at about the average price of admittance to similar types of

performances at local music clubs. The remaining mid-priced tickets were left at the same price, but decreased in number.

An estimate of the potential net income from the event was determined by subtracting expenses from the anticipated gross income (based on a 65% sold house). Approximately \$18,000 in net revenue appeared possible with this plan.

As stated earlier, however, Symphony management did not feel it had the resources to carry out such a project. This proposal, therefore, remained a theoretical exercise.

Please refer to Appendix E for the proposal submitted for this benefit concert.

Week Fifteen

My last project with the Symphony lasted for approximately one week. Activities during this period included collecting information from all departments for use in the Profile section of this paper.

III. MAJOR CHALLENGE OF INTERNSHIP

The major challenge posed during this internship was my assignment by the orchestra manager to organize the September 5 and 6 open vocal auditions. My responsibilities as auditions organizer included planning and organization, implementation, and follow-up activities.

The first step that I took upon being given this assignment was to research any information that was available on previous vocal auditions or other types of auditions. As no information was available in the Symphony's files on procedures used for conducting previous open vocal auditions, I had to develop my own methods for the most part. I was assisted by information found on instrumental auditions conducted in previous years and advice from the personnel manager.

I was informed near the end of my internship by a previous employee of the Symphony that files with information on open vocal auditions of previous years had existed in the Symphony office at one time. These records were apparently lost either during the Symphony's recent move to its present office or during a changeover of personnel in the operations department. These files would have assisted me during the planning process by providing me with information such as names and phone numbers of accompanists, what

size of turnout to expect, whether same-day callbacks had been necessary in the past, and sample methods of organization. Lack of this information did not preclude the possibility of holding successful auditions but it did make the job more difficult and resulted in a waste of time through the "reinvention of the wheel" in several instances.

In the following description and analysis, I will discuss the planning and organization, implementation, follow-up, and cost vs. benefits of the auditions.

Planning and organization

The necessity for open vocal auditions stemmed originally from the planning for the current season's programs. This had been done the previous year with inputs for programming and guest artists being made primarily by the music director and subsequent refinements provided by the executive director and orchestra manager. These refinements were based on budgetary, marketing, logistic, and other considerations.

After all guest soloists had been determined for the season, there remained several unfilled solo parts. These included vocal parts for Shostakovich's Symphony No. 13, Op. 27, "Babi Yar," Orff's Carmina Burana, Handel's Messiah, the Lerner and Loewe Concert, and Gershwin's Porgy and Bess. The filling of these parts was discussed during a senior staff meeting in the June prior

to the opening of the season. Staff members present at this meeting included the executive director, development director, marketing director, orchestra manager, and controller.

Options discussed during this meeting included the hiring of "big name" guest soloists, direct hiring of local singers, and the holding of open auditions from which singers would be chosen for the parts. The holding of open auditions was eventually chosen as being the most feasible option for several reasons.

As several "big names" were already to appear during the upcoming season, it was felt that their added expense would not appreciably increase subscriptions. Also, the potential drawing power of any additional "big names" for single-ticket sales would be diminished since any soloists hired at this point would not receive the benefit of publicity in the subscription brochures which had already been printed and mailed. These brochures are a primary source of information for many single ticket-buyers.

The marketing department had originally planned to mail monthly notices to potential single ticket buyers which would list all of the programs for the upcoming month. It is possible that these notices could have been useful in publicizing last-minute guest artist additions, however, funding for these pamphlets was cut early in the season.

The direct hiring of local singers without auditions would have been the simplest alternative to the hiring of expensive guest artists. The new artistic staff (music director, resident

conductor, and principal guest conductor), however, was not familiar with the singing talent in the area and felt it could not make the best selections without more information.

The holding of open auditions was decided upon as being the best option as the conductors would be given an accurate indication of the talent available in the area, and open auditions would be good for community relations. By having the intern organize the auditions, it was anticipated that the costs could be minimized and the intern would receive the benefit of the experience.

Planning for the auditions at the level of the Operations Department began approximately six weeks prior to the first auditions. It was at this time that the orchestra manager met with me to discuss the auditions. During this meeting, the orchestra manager and I went over the parts that had to be filled and I was given the names of persons who would have to be involved with the planning and organizing of the auditions. These persons included the conducting staff, Symphony chorus director, orchestra librarian, publicity director, and Orpheum manager.

The conducting staff would have to be involved as they were concerned with any artistic decisions made within the Symphony. Their input would be made primarily as members of the jury for the auditions. The Symphony chorus director was also included as a member of the jury as he was more familiar with the vocal demands of the parts to be filled. Additionally, he would be able to

provide information on many of the local singers as he was from the area.

The orchestra librarian's involvement in the auditions consisted of his provision of definitive information on the vocal parts of the works and the ordering and provision of parts for accompanist and singers in sufficient time for the auditions.

The publicity director had to be involved as the announcements for the additions would have to be made through the local and regional press. All information leaving the symphony for public consumption is first screened through the publicity director before it is released.

The Orpheum manager was a key contact as the auditions were to be held in the Orpheum Theater. Before the auditions could be scheduled, the Orpheum would have to be reserved and assurances made that the auditions would not conflict with other activities in the Orpheum. Once the requirements of the auditions were known, it would be the Orpheum manager's responsibility to have the theater ready and available for the auditions.

Six weeks proved to be a very short time in which to accomplish necessary planning and organization. Most difficulties which arose during this period were a result of the short lead time as well as uncertainty of the magnitude of response to the open auditions.

The dates of auditions could not have been delayed much later than September 5 and 6 as the first concerts in which soloists were

to sing were scheduled for October 10 and 11. Delaying the audition dates would have given the soloists less than five weeks to prepare their parts, increased the chances of the singers having scheduling conflicts with the concert dates, and delayed or prevented information on the soloists from getting into the program books.

One of the biggest hinderences to planning , made worse by the short lead time, was that all three members of the conducting staff were initially unavailable for consultation on finalization of concert programs, personal preferences in methods of selection of soloists, and their availability to serve on the jury on the dates of the auditions. As a result, several decisions in these areas had to be made in their absence. One consequence of these decisions was that one conductor was not able to attend any of the auditions in which singers were auditioned for two programs he was to conduct. This conductor also had reservations about holding auditions for the pieces he was to conduct (unknown to us at the time). Another complication was that decisions concerning parts available for the auditions had to be made later than desirable, resulting in a delay in press releases and a delay in the deadline for submission of resumes. The late submission deadline in turn delayed scheduling and mailing of notification letters to auditionees.

Length of time slots for each audition could not be determined until approximately ten days prior to the auditions. This was a

result of being constrained to a total of ten hours for all auditions and not knowing how great the turnout would be. Initially, time slots were planned to be fifteen to twenty minutes each. However, a great number of resumes was received near the deadline which necessitated scheduling the singers into shorter ten minute time slots. This last-minute scheduling contributed to the delay in sending of notification letters.

The short lead time available for planning resulted in methods of organization and implementation which were less than optimum. Many long distance telephone calls had to be made to ensure that auditionees had received information on audition procedures in time. These telephone calls were expensive both in terms of dollars and in man-hours. Additional expenses were also incurred as a result of a late decision to have callbacks.

Callbacks had not initially been planned as the singer response was not anticipated to be as large as it eventually became. Callbacks are usually necessary only when there are so many auditionees that the jury is unable to remember every candidate's audition. In retrospect, plans should have been made for callbacks from the very beginning which could have then been canceled if the singer turnout had been light. The best time for these callbacks would have been directly following the first set of auditions on that same day. This way, persons who had traveled long distances for the auditions would not have been subjected to

additional expense and the logistics for the Symphony staff would have been much simpler and less costly.

Ideally, planning should have begun at least six months prior to the auditions. This would have allowed for meetings with the conducting staff and the orchestra manager early in the process, permitted the setting of a deadline which would have given sufficient time for singers to respond, and allowed sufficient time for scheduling and other organization details.

Managerial Tools

The use of a computer for generation of an audition schedule and notification and rejection letters proved to be a great time saver. Frequent changes in the schedule were easily made in the computer without having to retype the entire document and the many letters sent out were generated by the computer with minimal input required for each letter.

A spreadsheet program was used for the audition schedule as this allowed use of wider paper capable of displaying a large amount of information in a readable manner. A callback audition schedule was generated with a wordprocessing program on smaller paper as fewer singers were involved and additional information on these singers was still available on the original, larger audition schedule.

A wordprocessing program was used for generation of notification and rejection letters. This procedure consisted of drafting of a form letter which was modified by the addition of individual information such as addresses, audition times, parts for which auditioning, and whether an accompanist would be provided.

Materials provided to the jury during the auditions included evaluation sheets stapled to copies of resumes for each auditionee and a copy of the master audition schedule. Information on the master audition schedule included the name of each singer, voice part, whether an accompanist was being provided, excerpts to be sung, parts for which the singer would like to be considered, time of audition, and address and telephone number. Copies of this schedule were also used for sign-in of the singers and as a contact sheet on the day of the auditions.

Implementation

The planned method of notification of the singers had been to send letters to each singer. As stated earlier, this had to be supplemented by phone calls. If sufficient time had been available, a response could have been requested of each applicant in each letter to verify that notification had been received. This would have lifted a large burden from the Symphony staff and reduced Symphony expenses.

Following is a description of the logistics for the auditions on September 6:

It had been planned that two persons would be necessary to check in auditionees, direct them to warm-up rooms and stage area, and take care of any additional needs that would arise. These two persons would be the orchestra manager and myself. One person would arrive at the Orpheum Theater approximately one hour before the start of the auditions in order to post signs directing singers to the check-in area and warm-up rooms, and set-up the check-in area. Items in the check-in area included a table, a short list of procedures for the singers, a sign-in sheet with all of the information given on the previously mentioned master schedule, and extra copies of music to be used in the auditions. The warm-up rooms would be numbered so that each singer could be assigned to a specific room number and kept track of by the audition organizer.

On the morning of the auditions, I arrived at the Orpheum one hour early as had been planned. However, the doors were locked and a person with a key had to be contacted to open the doors. The Orpheum Manager had not had the doors unlocked that morning as he had assumed that I would have a key. I had assumed that the Orpheum Manager would open the theater that morning as he had been notified of the audition schedule. These misunderstandings could have been prevented by having a brief meeting with the Orpheum Manager the day prior to the auditions. This was not done as many

other important last-minute details were being taken care of by myself late into the evening the day before the auditions. A contributing factor to this problem was the short time available for planning of the auditions.

The delay in opening of the doors caused some minor coordination problems initially as the check-in area was still being set-up when the first singers arrived. Once this area had been set-up and the signs posted, however, the auditions ran fairly smoothly.

The general flow for each singer was as follows:

1. Check-in
2. Verify audition selections
3. Speak briefly with his or her accompanist if they had not already done so
4. Be assigned to a warm-up room
5. Be ready and waiting to be led onto the stage while the singer scheduled directly ahead of him or her was on stage

The division of responsibilities between the two persons coordinating the auditions was such that one person coordinated all backstage activities while the other person coordinated all onstage activities. Both persons were available for any special needs required by the jury.

Ten minutes seemed to be an adequate length of time for each audition. Each of the singers was able to sing two or three excerpts and the jury was able to get a good idea of his or her style and abilities. The jury started to run a bit ahead of schedule early in the afternoon which allowed persons who had been put on standby and persons who showed up with no advance notice to be put into audition slots. Ultimately, all persons who had wanted a chance to audition were given the opportunity to do so.

When it became apparent that the auditions were running ahead of schedule, persons who were scheduled for auditions later in the day and who had not yet arrived were called and requested to arrive as early as possible. These calls only became necessary as most singers were not arriving an hour ahead of time as they had been requested.

These calls could have been possibly avoided if the singers had been given more of an incentive to arrive early. A statement in the notification letters could have been added which stated that singers would lose their audition slots if the auditions did run ahead of schedule and the singers were not available to sing an hour prior to their scheduled audition time.

The auditions were completed ten minutes prior to the originally planned cut-off time. At this time the jury decided to make the initial round of eliminations. It was also at this time that the jury decided it would be necessary to have callbacks as they felt it was impossible to adequately remember each audition.

The master schedule sheet was used as an impromptu aid in making the initial eliminations. Columns were made on the right side of each sheet in which indications were made as to whether or not a person was to be considered for a particular part. These schedule sheets in addition to the rating sheets were also used by the jury in making later decisions. Please refer to Appendix G for a summary of audition statistics.

Follow-up

The first order of business following the auditions was the notification of singers as to the result of the auditions. The first singers notified were those who would have to immediately begin preparing their parts for an upcoming concert. After initial contact by telephone, these persons were sent contracts, photographs and biographical information was collected, and music was distributed. Equally important to notification of these singers was notification of singers being requested for callbacks the week following the first auditions.

Again, the short lead-time available necessitated the use of telephone in contacting these singers. Several singers who had traveled long distances to attend the first auditions were requested to return for callbacks the following week. This proved to be very inconvenient and expensive for the singers who did decide to return and put the singers who were unable to return at a

possible disadvantage in the selection process. The solution to this problem, as stated earlier, would have been to have callbacks immediately following the first auditions on the same day.

As the callbacks involved a much smaller number of singers, the procedures for these auditions were simplified and made less formal. Only one person (myself) was required to coordinate the callbacks. A simplified schedule sheet was provided to the jury as much information was still available on the schedule sheets used for the first auditions.

Following the callbacks, two types of letters were sent to all singers who had auditioned. The singers who had been eliminated from further consideration were sent letters stating this fact in addition to the promise to contact them if other opportunities arose. A ticket voucher redeemable for two complimentary tickets to any New Orleans Symphony subscription concert was also included with each letter. This was done in an effort to keep good relations with musicians in the area and as partial compensation for the efforts the singers made in preparations for their auditions.

would be

Costs

The largest costs of the auditions were primarily in terms of manhours. Following is an estimate of the time spent on the auditions by various personnel:

Intern: 160 hours (4 weeks)

(organization)

Resident conductor: 14 hours

(jury member)

Orchestra manager: 10 hours

(organization)

Music director: 8 hours

(jury member)

Chorus director: 4 hours

(jury member)

Librarian: 4 hours

Publicity director: 2 hours

Orpheum manager: 2 hours

TOTAL: 204 hours

If a dollar value were to be assigned to the amount of time contributed by each person to the auditions, a rough estimate of this value would be \$2,860. This is based on the following estimates on each person's worth of contributed time:

Intern: \$12/hr.

Resident conductor: \$20/hr.

Orchestra manager: \$20/hr.

Music director: \$35/hr.

Chorus director: \$20/hr.

Librarian: \$12/hr.

Publicity director: \$14/hr.

Orpheum manager: \$12/hr.

For the purposes of this analysis, the 204 manhours will be considered to be donated. The bulk of manhours were provided by an intern, whose "pay" consisted of the experience derived from organizing the auditions. All of the other persons who put in time for the auditions, with the exception of the Chorus Director, were full-time "exempt" Symphony employees who did not receive any additional pay for their services. As the time spent on the auditions by these persons was probably not great enough to detract from their other responsibilities, the cost to the Symphony in terms of manhours will be considered to be negligible.

The only "real costs" that could be associated with the auditions are stationery and postage for notification and reply letters to the auditionees and for press releases, photocopying of grade sheets, resumes, schedules, and press releases, long distance telephone calls, and Orpheum utilities. Following is an estimate of these expenses:

54 notification letters:

postage	\$ 12.00
---------	----------

stationery @.10/letter	5.40
58 reply letters:	
postage	13.00
stationery @.10/letter	5.80
400 photocopies @ .07	28.00
40 long distance telephone calls @ \$1.50:	60.00
Orpheum utilities (est.)	50.00

TOTAL:	\$174.20

Benefits

The benefits derived by the Symphony through the auditions were the opportunity for the new conducting staff to become familiar with the local and regional talent available, the potential to save in artists fees by utilizing local talent instead of more expensive national or international talent, a positive public image, and the providing of additional opportunities for local musicians. These benefits are in addition to the benefit in experience received by the intern.

In future years, the present as well as future conducting staffs will have the benefit of being able to review audition grade sheets and resumes when looking for singers to fill various solo parts. Previously, no records existed with the Symphony on the vocal talent available locally or in the region (Texas, Louisiana,

Mississippi, and Alabama). The Symphony now has a singer resume file of over 60 resumes; a file of grade sheets from the auditions; a listing of all singers who auditioned, their vocal parts, addresses, and phone numbers; and a contact sheet for five local accompanists.

The money saved by the Symphony by hiring local singers as opposed to more expensive internationally recognized talent is considerable. Typical artist fees for singers of an international caliber can exceed \$3,000 per program. The average fee paid to the local singers was \$600 per program.

Non-monetary benefits of hiring local singers are that these singers will be given the opportunity to develop professionally and have added incentive for staying in the New Orleans area. This contributes to the building of a local pool of professional quality singers.

It is difficult to place a dollar value on the positive community relations the Symphony received as a result of the auditions, however the effect will probably be significant and long-lasting. Through word of mouth, the local professional music community can influence, to a large degree, the way the rest of the community perceives a local musical phenomenon. For example, if the New Orleans Symphony developed a reputation for being unfair to local musicians, word of this would soon spread to the rest of the community. Potential negative results of this could be less inclination for people to make contributions to the Symphony or

renew subscriptions. The holding of open vocal auditions was good for the Symphony's community relations in that the organization now cannot be perceived as being closed and unresponsive to the needs of the local musical community. Development of close ties with the local community and the strengthening of the support-base for classical music in New Orleans is also consistent with the mission statements in the Symphony's charter.

Conclusion

The problems mentioned throughout this description and analysis of the the vocal auditions can be traced firstly to the lack of time in planning and organizing; secondly to the lack of information from previous years for use in planning; and thirdly to the experience level of the participants in running local auditions. By pointing out these problems, I do not mean to imply that auditions were a failure, but that they could have been run much more efficiently. Efficiency is especially important to arts organizations as resources are frequently in short supply.

As pointed out earlier, the failure to begin serious planning for the auditions at least six months prior to the date they were to take place resulted in several of the most important participants not being available to provide input during the planning process. The most serious problem that this caused was the erroneous assumption on the part of the operations staff that

the principal guest conductor would be receptive to holding open auditions for vocal parts of pieces he was to conduct. After all preparations and public announcements had been made based on this assumption, the principal guest conductor informed the orchestra manager it was in fact not his intention to audition for these parts and that he already had singers in mind. Much tactful persuasion had to be used to get this conductor to ultimately consider additional singers. The situation ultimately turned out for the better as the principal guest conductor later agreed that he was very impressed with some of the auditionees.

Another key person who was not available during the planning process was the chorus director. His input would have been valuable in the resolution of such issues as how audition excerpts should be chosen to best demonstrate a singer's range, style, vocal quality, etc., and which local pianists would be good candidates for accompanying duties. Solutions to these problems were eventually found by myself, though they may have not been entirely optimum. The search for an accompanist, for example, took much time and resulted in the accompanist having only one week to prepare the piano parts for the auditions.

Aside from not having key persons available for consultation during the planning process, the time shortage resulted in an inefficient method of communication with the potential auditionees. All contacting was done by telephone which was expensive and took up a large part of my time the last two weeks before the auditions.

The most efficient way of communication would have been through correspondence. In this way, potential auditionees would have submitted necessary information such as audition selections, range, and parts for which they were auditioning on standardized forms by a certain date. This method would have greatly simplified the organization process.

One method of screening applicants that was not considered due to the shortage of time was the submission of audition tapes by the auditionees. This would undoubtedly have cut down on the logistic problems but would have necessitated an even greater lead time for planning. A drawback in the use of audition tapes, in addition to the longer lead time required, is that a tape may not clearly represent a singer's abilities.

The lack of information on procedures for previous vocal auditions was of secondary importance as new procedures were improvised in a relatively short period of time utilizing advice from the orchestra and personnel managers, procedures for instrumental auditions, and common sense. Most useful would have been information on the turnout of previous years, publicity channels used, and a list of local accompanists.

The last factor which led to occasional problems was the inexperience of myself, the orchestra manager, and the conducting staff in conducting open vocal auditions in the New Orleans area as all of these staff members were new. Lack of knowledge of such things as the turnout to expect resulted in the incorrect

assumption being made that callbacks would not be required. As stated earlier, a safeguard should have been in place to have same-day callbacks should the need have arisen.

IV. RECOMMENDATIONS BASED ON MAJOR CHALLENGE OF INTERNSHIP

Solutions to these problems should be fairly simple for any persons conducting similar auditions in the future. Assuming files are maintained containing such things as a copy of this report, planning documents, resumes, grade sheets, and a list of important contacts; a person would merely have to familiarize himself with this information before planning the next auditions. Common sense, energy, dedication, and previous experience coordinating activities, in conjunction with the use of this material would be all that would be required.

Following is a proposed schedule that could be used in planning for future open vocal auditions:

Six months* prior:

- Meet with conducting staff, Executive Director, and Orchestra Manager to discuss such things as who will be members of the jury; identification of all parts for which auditions will be held; whether an initial screening should be made using cassette tapes submitted by auditionees and when and where the screening will take place; whether auditions should be local, regional, or national; preferences for accompanist; and where auditions will be held.

-Reserve auditions location for two adjacent dates. Two dates may be required for a large response.

-Immediately inform jury of the selected dates and verify that they have no scheduling conflicts.

-Collect information on who, what, when, where, etc. for inclusion in press release and application forms.

-Develop mailing list for applications and press releases.

Newspapers, universities, choral groups, and individuals are possibilities for inclusion on this list.

and/or application forms should be mailed

-Notify the orchestra librarian of the vocal parts and piano reductions required for the auditions and the date they are required. The piano reductions should be provided to the accompanist about one month prior to the auditions. The vocal parts should be on hand for use of jury members two weeks prior to the auditions. Extra copies of all vocal parts should be available for emergency use by the auditionees on the day of the auditions. As auditionees should be instructed to provide their own parts, only copies for the jury members and two additional sets should be required.

Five months prior:

-Mail press releases and/or application forms. Specific instructions should be given to auditionees to include information in applications such as the pieces for which auditioning, three excerpts to be prepared, whether an accompanist is required, and voice. Resumes and cassette tapes, if used, should also be included with submitted applications. Deadline for return of applications should be two months prior to the audition date to allow time for scheduling of audition time slots and sending of notification letters.

If cassette tapes are used for screening, press releases and/or application forms should be mailed seven months prior to the auditions. Deadline for return of applications should be four months prior to the audition date to allow time for screening of tapes and scheduling of audition slots and sending of notification/rejection letters.

-Make and distribute to all staff members, a fact sheet containing all known, relevant information concerning the auditions. This can be used as a reference for staff members for their own planning purposes or for answering questions from the general public.

Four months prior:

-Contract accompanist.

-Begin scheduling auditionees whose applications are received. A template can be set up with a spreadsheet program for this purpose. As many changes are likely to be made to information entered at this time, it is best not to print out the final schedule until the deadline date.

-Enter notification/rejection letter body and names and addresses of applicants, as applications are received, into computer. The address list can later be merged with the letter body, with information specific to each auditionee being added before the letters are printed.

-Hold cassette screening session (if cassettes are being used).

Three months prior:

-Begin making audition folders or packets for the jury members. These folders or packets should include music for all the parts, grade sheets for each auditionee, copies of resumes for each auditionee, and an audition schedule.

Two months prior:

- Send notification/rejection letters.

- Print out master schedule.

- Make and distribute to all staff members an updated auditions fact sheet.

One month prior:

- Confirm arrangements with person in charge of facility to be used for auditions.

- Confirm dates and times of auditions with jury members.

- Provide accompanist with music for auditions.

Two weeks prior:

- Complete packets for jury members and distribute.

- Walk through facility to be used for auditions to determine logistics, check-in area, signs placement, warm-up rooms locations, etc.

-Prepare signs and check-in instructions for auditionees.

One day prior:

-Confirm times and handle last-minute details with all persons to be involved with organizing auditions.

-Post signs and set up check-in area.

*Before this time, decisions should have been made by the Executive Director and Music Director that auditions should take place; that the results are needed for inclusion in programs and publicity by a certain date; and that the selected singers should have music to rehearse by a certain date. The deadline date for submissions for publicity and amount of time required for rehearsal by the singers determine, to a large degree, when the auditions should take place. In auditions where cassette tapes are submitted by auditionees, the planning process should begin two months earlier (eight months prior to the auditions).

V. SHORT AND LONG-RANGE EFFECTS OF INTERNSHIP

The most important short-range effects of my internship were a result of my day-to-day activities in the Operations Department and Customer Service. In both instances, I functioned as a regular employee would have in similar situations.

In the Operations Department, I was able to remove an administrative load from the Orchestra Manager by performing duties of the vacant Administrative Assistant position in that department. By having an assistant at his disposal, the Orchestra Manager was able to dedicate more of his time to other matters and therefore become more productive. This also resulted in a financial savings for the Symphony as the position was allowed to remain vacant.

Examples of normal duties in the department that were delegated to me were the preparation of memos and letters, updating of the orchestra master calendar, miscellaneous errands, and the coordination of the open vocal auditions. I feel that it would have been highly unlikely that the Orchestra Manager would have undertaken the coordination of the vocal auditions had it not been for my presence.

In Customer Service, I was able to make similar contributions by shouldering some of the burden in the department and saving the Symphony money by allowing a Customer Service Representative

position to remain vacant for several weeks. As mentioned earlier, Customer Service was under severe pressure due to problems with customers receiving tickets.

The most important long-range effects of my internship were the drafting of job descriptions, collection of resumes from most of the area's singers, provision of the critique sheets used by the jury during the vocal auditions, establishment of a foundation prospect file, drafting of security procedures, and the writing of this report. All of these documents can be used by future administrators in appropriate aspects of the Symphony's operations.

The job descriptions which I drafted for positions in the Operations Department can be used by future Orchestra Managers to get an idea of how the department has been run in the past. They can also be used as a guide for new employees in their duties and responsibilities and serve as a basis for evaluation.

In the future, if a new Music Director is hired and is unfamiliar with the local singing talent, he can look through the singer resume and critique sheet files to get a preliminary idea. This material can also be used by the current conducting staff to review the singers available.

In the past, the New Orleans Symphony has relied mostly on contributions from local foundations and has not sought funds from national level foundations. Through the information collected in the foundation prospect file, future Development Directors will be

saved the time of performing this primary research and will have leads which can be pursued further.

The security procedures drafted for the Orpheum Theater will hopefully decrease the chances for thefts in the future. At the very least, they could serve as a guide to future House managers for implementing their own procedures. No procedures of this type had been in place previously.

The critique of various aspects of Symphony operations mentioned in this report could be used by management in future planning. Additionally, the proposed schedule for planning of vocal auditions could serve as a guide for future organizers of vocal auditions.

NOTES

1A runout concert is a concert in which the orchestra travels to a performance site outside of its normal area of operations and returns that same day.

2American Symphony Orchestra League, Data Base Summary: Major Orchestras 1979-80 through 1983-84 (Washington, D.C.: American Symphony Orchestra League, 1985).

3Sidney Gael, Job Analysis, (San Francisco: Jossey-Bass, 1983); Robert L. Mathis and John H. Jackson, Personnel: Human Resource Management, (St. Paul: West Publishing Company, 1985); U.S. Department of Labor, Handbook for Analyzing Jobs, (Washington, D.C.: U.S. Government Printing Office, 1972).

4An "exempt" employee is a salaried employee who is permitted by law to work beyond forty hours per week without additional compensation. Most "exempt" employees are in the managerial category.

Appendix A

ARTIST CONTRACT CHECKLIST

1. Repertoire confirmation letter on file.
2. Contract ordered.
3. Contract reviewed for errors/changes in dates, addresses, rehearsals (2 preferred), etc.
4. Proofed contract signed by executive director.
5. Broadcast rider signed on all contracts.
6. Cover letter to agency prepared.
7. Signed contract sent to agency for countersignature.
8. Fully executed contract received and filed.
9. Copy of face of contract forwarded to controller with payment paragraph(s) highlighted.
10. Copy of technical rider filed and distributed to appropriate persons.
11. Press kit ordered (public relations sends requisitions; materials needed at least two months before concert; UPS shipping preferred, regular mail alternate).
12. Press kit received.
13. Bio and photos on-hand.
14. Itinerary on-hand.
15. Hotel confirmed (deluxe-Fairmont; reasonably priced-Clarion).
16. Language of vocal texts.
17. Complimentary tickets.

513-621-1919



NEW ORLEANS
SYMPHONY
ORCHESTRA

212 Loyola Avenue Suite 500
New Orleans, Louisiana 70112



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SYMPHONY
ORCHESTRA

212 Loyola Avenue Suite 500
New Orleans, Louisiana 70112

Orchestra Member

Staff



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NEW ORLEANS
SYMPHONY
ORCHESTRA

212 Loyola Avenue Suite 500
New Orleans, Louisiana 70112

Orchestra Member

Stage Crew



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SYMPHONY
ORCHESTRA

212 Loyola Avenue Suite 500
New Orleans, Louisiana 70112



NEW ORLEANS
SYMPHONY
ORCHESTRA

212 Loyola Avenue Suite 500
New Orleans, Louisiana 70112

Orchestra Member

Stage Crew

Appendix C

ORPHEUM THEATER SECURITY PROCEDURES

1. NOSO I.D. cards shall be issued to all permanent and temporary employees. Permanent I.D. cards shall be issued by the Operations Department. All temporary passes shall be issued and controlled by the Orpheum Manager and Stage Manager.

2. NOSO employees should at all times be prepared to present I.D. cards issued by NOSO for admittance into the Orpheum Theater and facilities at runout locations.

3. Persons other than NOSO employees shall not be admitted to backstage or office areas of the Orpheum without written permission (or issuance of a temporary pass) from the Orpheum Manager or Stage Manager.

4. Security personnel shall be placed at all authorized entrances to the Orpheum as required. These personnel shall check for proper identification and deny entrance to any person not presenting appropriate identification.

5. All NOSO employees shall be required to enter the Orpheum at the stage left alley entrance. During cold weather, employees will be required to enter the theater through the stage right alley entrance. All other entrances shall be kept locked.

6. On evenings of performances, security personnel will be placed at the designated entrance from 6:30 to 8:00 PM. During this period, persons entering the theater shall be checked for proper identification before being admitted. Before and after this period, the entrance will not be manned by security personnel and shall be kept locked.

On those occasions where a large number of musicians are expected to arrive at the theater after 8:00 PM, a security position will be maintained at the appropriate stage door until a predetermined everybody-should-be-in time. Single instances of musicians requiring a late access will be handled by the head security guard or the house manager.

7. The custodian for all keys to all locks for the Orpheum shall be the Orpheum Manager. Keys shall be issued by the key custodian on either a permanent or temporary basis to only those personnel so designated in writing by the Orpheum Manager as having a need to possess a key. Appropriate procedures for check-out and control of keys shall be instituted by the key custodian.

FOUNDATION/CORPORATE PROSPECT INFORMATION FILE

DATE: _____

PREPARED BY: _____

SOURCE: _____

SYMBIONESE LIBERATION ARMY
COMPUTER SYSTEM UPGRADE

NAME: _____ ATTN: _____

ADDRESS: _____

ADDRESS: _____

CITY: _____ STATE: _____ ZIP: _____

TYPE (FOUNDATION/CORPORATION): _____ TEL: _____

TYPE OF FOUNDATION/BUSINESS: _____

RELEVANT AREAS OF INTEREST: _____

LOCAL OPERATIONS: _____

GRANT DISTRIBUTION (GEOGRAPHICAL): _____

ASSETS/YR.: _____

TOTAL AMOUNT GIVEN/YR.: _____

TYPICAL GRANTS RANGE: _____

TYPES OF GRANTS: _____

IN-KIND DONATIONS: _____

NOSO CONTACTS: _____

PRIOR NOSO GRANTS/YR.: _____

APPLICATION PROCEDURES: _____

COMMENTS: _____

CROSS-REFERENCE: _____

Appendix E

NEW ORLEANS SYMPHONY ORCHESTRA DEVELOPMENT DEPARTMENT
COMPUTER SYSTEM UPGRADE

A Proposal To: The Frost Foundation
Cherry Creek Plaza II
Suite 810
650 South Cherry Street
Denver, Colorado 80222

Submitted By: The New Orleans Symphony Orchestra
212 Loyola Avenue, Suite 500
New Orleans, Louisiana 70112

Project Director: Martin Beller
Development Director
(504) 524-0404

Summary Of Project: The New Orleans Symphony is currently unable to realize its fundraising potential due to lack of adequate data processing equipment and proper computer training for personnel. The present computer system, heart of most of the Symphony's development activities, is based on 15 year old technology and is not compatible or able to interface with systems in other departments.

The proposed solution to these problems is the installation of a multi-terminal system which is compatible with hardware in other departments and uses the most modern fundraising software. Thorough training of development personnel is also an integral part of this plan. Blackbaud MicroSystems, Inc. has completed a review of the development department's computer environment and has proposed a comprehensive package which includes all hardware, software, installation, training, and maintenance. This package is described in detail in the full proposal which follows. The start date of this project would be in April 1987.

Budget Total: \$35,385.60

Amount Requested From The Frost Foundation: \$35,385.60

Authorizing Official:

Robert S. Gross, Executive Director

Brief History of the New Orleans Symphony

The New Orleans Symphony had its beginnings as the New Orleans Civic Symphony. Its first conductor, a Russian-born cellist named Arthur Zack, assembled an orchestra of 54 musicians for the Symphony's first concert in the Municipal Auditorium on May 18, 1936.

In 1939, Zack gave way to Ole Windingstad, a musically-superior conductor, who undertook an expansion effort in what was to become a tradition of continuous improvement.

Massimo Freccia was appointed Music Director in 1944 and held that position through 1951. That same year, the Symphony merged with the New Orleans Philharmonic Society (a group dedicated to bringing major artists to the city) becoming the New Orleans Philharmonic Society. Through its increased resources, the Society was able to hire renowned violinist Alexander Hilsberg as Music Director for the 1952-53 Season.

Under Hilsberg, the Orchestra expanded in several areas. Concerts were regularly broadcast on radio and public television. Tuesday morning rehearsals were opened for admission to the public and a Music Library was formed.

Then Assistant Conductor of the New York Philharmonic, Werner Torkanowsky was chosen to fill the conducting post with the New Orleans Symphony in 1962. A winner of the prestigious Naumberg Award, he continued the artistic expansion begun under Hilsberg. During Torkanowsky's 14 year tenure, the Orchestra attracted several large grants, continued to tour, and produced its first recording with famed New Orleans Opera star Norman Treigle.

In 1976, Torkanowsky announced his resignation. Leonard Slatkin, a guest conductor that Season, was tapped as the next Music Director. Slatkin was known for his imaginative programming and rapport with the audience. He attracted such guest artists as pianist Van Cliburn, Itzhak Perlman, and Jean-Pierre Rampal. In 1979, Slatkin left New Orleans to become the Music Director of the St. Louis Symphony.

In September of 1980, Philippe Entremont became the seventh conductor of the New Orleans Symphony Orchestra. A pianist of international repute, Entremont led the Symphony over the next six seasons into its Golden Anniversary and to the eminent position it holds today. A triumphant return to Carnegie Hall and a critically successful tour of Europe in 1982 solidified the Orchestra's fine reputation as a world-class ensemble. Also during the Entremont

era, the Symphony found a home in the historic Orpheum Theater. This Season, Entremont turns the baton over to Maxim Shostakovich, the son of famed Russian composer Dmitri Shostakovich. Maestro Shostakovich conducts 32 of the 55 Classical performances which comprise the heart of the Symphony's Season. In addition, the Orchestra will perform a 10-concert Pops series, the annual Holiday concerts, Handel's "Messiah," and the "Discovery" series of Saturday morning concerts for families. As in years past, the Symphony will travel to the Audubon Zoo, Mobile, Alabama, and beyond for a variety of performances.

Orchestra members serve on the faculties of Tulane University, UNO, Loyola University, Dillard and Xavier Universities, and the New Orleans Center for the Creative Arts (NOCCA), thereby creating a body of professionally trained and experienced artists who pass on their expertise to area students. The entire Orchestra provides the thrill of live music for the productions of the New Orleans Opera and New Orleans City Ballet, and within the Symphony, there are several small ensembles which perform regularly around the city. During the summer off-season, the New Orleans Symphony is represented around the country by individual musicians at major music festivals.

All together, the New Orleans Symphony performs over 125 concerts annually, some of which are taped and broadcast on WWNO radio.

Purposes and Objectives of the New Orleans Symphony

The purposes and objectives of the New Orleans Symphony as stated in its articles of incorporation are "to organize and maintain a major symphony orchestra in the City of New Orleans; to present in New Orleans and elsewhere celebrated artists in concerts and recitals; to advance the musical education of the youth of the City; and in general to promote a public interest in and for the advancement of orchestral and vocal music in New Orleans and elsewhere."

Administrative Structure of the New Orleans Symphony

The administrative staff of the orchestra is organized into four departments under the management of the executive director. These departments are operations and production, development, marketing, and finance. Positions in the operations and production department include orchestra manager, orchestra personnel manager, librarian and program annotator, stage manager, and secretary. The orchestra manager also oversees the Orpheum Theater staff which consists of house manager, technical director, engineer, and janitor. Positions in the marketing department include marketing director,

PR/media manager, and PR/media associate, sales manager, and customer service manager. The Orpheum Theater box office staff is also supervised by the marketing department. Positions in the development department include development director, assistant development director, records specialist, campaign assistant, and secretary.

Purpose of the New Orleans Symphony Development Department

The primary responsibility of the development department is to organize all fundraising efforts which are intended to provide contributed income to supplement the orchestra's earned income. Being extremely labor intensive, the Symphony cannot hope to sustain itself through earned income alone. Funding sources include individuals, small businesses, large corporations, foundations, and public agencies.

Fundraising efforts are organized into campaigns, special events, and development of support from corporations, foundations, and public agencies. Examples of campaigns include annual direct mail, capital, endowment, and special. Special fundraising events include telethons, book fairs, balls, benefit concerts, and numerous smaller events sponsored by Symphony auxiliary groups.

Problem to be addressed

An ongoing challenge for any symphony orchestra is to raise a sufficient amount of contributed income which will offset the "earnings gap" in the budget. This is the economic reality of any labor-intensive performing arts organization. The New Orleans Symphony is no exception in this regard. An additional burden inherited by the current management, however, is a 4.1 million dollar debt resulting from renovation of the Orpheum Theater, a 1982 European Tour, and weak marketing and development efforts of previous staffs. In order to survive, the New Orleans Symphony must greatly increase its supplemental income received in the form of charitable contributions.

As the largest and most active cultural organization in the state of Louisiana, the New Orleans Symphony is a very "fundable" organization. This fundraising potential, however, cannot be realized without adequate data processing equipment and proper computer training for personnel. The present computer system, heart of most of the Symphony's development activities, is based on 15 year-old technology and is not compatible or able to interface with systems in other departments.

Many of the tasks that are now being performed manually by development personnel could be accomplished in a fraction of the time if modern software and hardware were available. The lack of compatibility with equipment in other departments, especially

marketing, results in valuable information not being accessible for use in development efforts. Additionally, all data must be entered via a single terminal in the development department. This frequently ties up the computer, preventing its use for other tasks.

As a result of the present system's lack of certain capabilities, several aspects of production for the direct mail campaign must be performed by outside contractors. This is estimated to cost the Symphony over \$12,000 per year. Other deficiencies of this system include the inability to identify, track, research, and document all donors, and to provide rapid reporting of financial results of various fundraising efforts.

Project description

The proposed solution to the problems outlined above is the installation of a multi-terminal system which is compatible with hardware in other departments and uses the most modern fundraising software. Thorough training of development personnel in the use of this system is also an integral part of this plan. Please refer to attachment 1 for a description of "The Raiser's Edge" system, proposed hardware, support, and prices as provided by Blackbaud MicroSystems.

Project objectives

Installation of this system will save the Symphony approximately \$12,000 per year in expenses incurred through use of outside services in production of direct mail packages. The present system is unable to be utilized for this function as it is inflexible and is in constant use for other purposes.

With an increase in efficiency a new system can be expected to bring, the volume of mailings to prospects can be increased up to threefold. It is estimated that individual contributions will rise by 25% as a result of these increased mailings. A 25% increase in responses over last year's direct mail campaign will result in an increase of approximately \$7,500.

With a system capable of providing much more detailed tracking of pertinent information on present and potential donors, more effectively tailored solicitations can be made. Although an estimate is difficult to make on the benefits this will bring, it is reasonable to assume that through a combination of minor and major gifts that would have ordinarily been lost, the Symphony will gain over \$15,000 per year.

Total estimated gain per year resulting from installation of this system is \$34,500. In effect, the system will pay for itself in one year.

Project evaluation

Evaluation of the success of this project will be based on the increase of contributions, and savings incurred as outlined above. A less objective evaluation will be comments from development personnel, and observations made by the development director on increases in efficiency.

Project time frame

The start date of this project will be in April 1987. This will allow adequate time for installation of hardware, training of personnel, and changeover from the old to new system in time for the 1987-88 campaign, beginning in August 1987.

December 1, 1986

Dr. Theodore Krauss, Executive Director
The Frost Foundation, Ltd.
Suite 810
650 South Cherry Street
Denver, CO 80222

Dear Dr. Krauss:

Enclosed please find the New Orleans Symphony's proposal to the Frost Foundation for purchase of a new computer system for the development department. I have also included the following attachments:

- 1.) Description of the computer system and budget submitted by Blackbaud MicroSystems, Inc.
- 2.) I.R.S. determination letter: 501(c)(3).
- 3.) Copy of most recent financial statement (audited).
(A 1985-86 audited financial statement will be available in three weeks and will be forwarded to the Frost Foundation if requested.)

As the proposal makes clear, this system would be a great improvement over the current system, allowing the Symphony for the first time to realize its full fundraising potential.

If you have any questions, or require further information, please do not hesitate to call me.

Respectfully submitted,

Martin Beller
Development Director

Appendix F

PROPOSAL FOR A BENEFIT CONCERT FOR THE NEW ORLEANS SYMPHONY

I am proposing that the New Orleans Symphony sponsor a benefit concert at the Orpheum Theater featuring Allen Toussaint and other local Jazz, and Rhythm and Blues artists such as Ellis and Wynton Marsalis, Irma Thomas, and Aaron Neville. This event would bring in much needed revenue, increase the Symphony's visibility in a positive way, and demonstrate black support for the Symphony. It would also introduce a segment of the concert-going public not currently attending Symphony concerts to the idea of attending a Symphony concert at the Orpheum.

It is recommended that this event be planned to take place in early Spring of 1987. This would provide adequate time for planning and publicity, and would not conflict with the many other Symphony events planned for December. The timing of the event should also be such that fundraising efforts can be built upon the resulting publicity.

With the ticket pricing scheme outlined below, it is estimated that the event could gross approximately \$23,000 with 65% of the seats sold. After all expenses have been met, the net revenue could exceed \$18,000.

All services by the musicians would be donated. The only expenses would be publicity, Orpheum Theater front-of-house operations, sound system rental, and cartage. If Ellis and Wynton Marsalis agreed to appear, air transportation could be provided by a ticket tradeout with a local airline as has been done with other guest artists.

Following is a ticket pricing scheme and expense budget for the benefit:

Ticket price	Number of seats	potential revenue
\$50	76	\$ 3,800
32	230	7,360
22	271	5,962
16	696	11,136
12	253	3,036
10	399	<u>3,990</u>
	TOTAL	\$35,284 X 65% = \$22,934

Expenses:

Publicity:

Paid Ads (Times-Picayune, Gambit, Wavelength)	\$1,790
Posters (typeset and printing)	205
Flyers (artwork and printing)	120

Orpheum:

Personnel (FOH and technical)	1,350
Clean-up	150
Sound system rental	500
Cartage	<u>400</u>
TOTAL	\$4,515

\$22,934(estimated gross revenue)

- \$4,515(estimated expenses)

= \$18,419(estimated net revenue)

Appendix G

Vocal Auditions
September 5, 6, 1986
SUMMARY

# persons auditioned:	September 5:	9
	September 6:	49
	TOTAL:	58
# persons scheduled:	September 5:	10
	September 6:	44
	TOTAL:	54
# no-shows:	September 5:	1
	September 6:	4
	TOTAL:	5
# walk-ins:	September 5:	0
	September 6:	3
	TOTAL:	3
# standbys: (called prior to audi- tion but no room in schedule)	September 5:	0
	September 6:	6
	TOTAL:	6
# persons requiring accompanist:	September 5:	0
	September 6:	32
	TOTAL:	32

Average duration of each audition: 7.2 minutes

Average number of selections sung for each audition: 2.4

persons removed from consideration following September 6
auditions: 30 (52%)

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