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## New Orleans Ballet Association

Megan Workman  
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**NEW ORLEANS BALLET ASSOCIATION**

A Graduate Internship Report

Submitted to the Graduate Faculty of the  
University of New Orleans  
in partial fulfillment of the  
requirement for the degree of

Master of Arts  
in  
Arts Administration

by

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May 2009

## **ABSTRACT**

The following report documents the internship performed by Megan Workman at the New Orleans Ballet Association (NOBA) in New Orleans, Louisiana from January 5, 2009 to May 31, 2009. Since 1970, NOBA has existed as a non-profit organization devoted to the presentation of dance and related services to the surrounding Central Gulf region. NOBA currently operates from its offices in the Patrick Taylor Building at One Lee Circle. During this time with NOBA, I worked closely with the Development department and was responsible for the creation and completion of many grant requests, as well as several final reports for funders and additional development research as needed. This report includes information regarding NOBA's history and organizational structure. It catalogues the duties I performed and the extent of my contribution. It discusses NOBA's strengths, opportunities, weaknesses, and threats. Finally, it examines current best practices in the nonprofit field, and makes recommendations for NOBA based on this research.

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## INTRODUCTION

My professional experience with the New Orleans Ballet Association began in November of 2008, when one day I finally worked up the courage to leave a voicemail for Jenny Hamilton, Executive Director of NOBA stating my desire to intern with the organization in the spring of 2009. I received a call back several days later from Suzanne Hirsch, the Education Director and my future supervisor, to come in for an interview. During the interview I explained my interest in exploring the administration of an art form outside of visual art, where all my prior experience lay. I also assured both women of my comfort and familiarity with grant writing, thanks to the Development class I took while in the Arts Administration program and a previous development internship I held at a museum several years ago. It was therefore agreed that I would assist Ms. Hirsch with all grant writing and reporting responsibilities, beginning at the start of 2009.

Throughout the five months I spent at NOBA, I became well-acquainted with their financial structure, fundraising practices, and grant writing process. While my internship could have been more well-rounded in terms of the number of departments I was able to assist, it did afford me with a very intimate look into how a well-established non profit organization maintains financial health through fundraising. It is therefore the development department, and more specifically fundraising through grant requests, that I will focus on in this report. In it, I will detail:

- A history of the organization, its current programming, and the structure of its management and finances,
- Details of my duties and activities within the internship,

- The strengths, weaknesses, opportunities, and threats to the organization's financial structure and current fundraising practices,
- Best practices for fundraising in an economic recession and recommendations for how NOBA can follow them, and
- An overview of my short and long term contributions to the organization as an intern.

## **CHAPTER ONE**

### **THE ORGANIZATION**

#### **History**

The New Orleans Ballet Association (NOBA) was originally founded as a civic ballet company in 1969 by Harvey Hysell under the name Hysell Ballet, but shortly thereafter changed its name to the New Orleans Ballet. The company, which was made up of local dancers, showcased traditional classical ballet and was occasionally able to bring in guest stars of international fame such as Suzanne Farrell, Margo Fonteyn, and Peter Martins. It operated as such for 13 seasons until it folded in 1983 due to artistic differences between its two directors. It then began a partnership with the Cincinnati Ballet and changed its name to the New Orleans City Ballet. The two organizations maintained separate boards and staff, but shared their artists and repertoire. The company consisted of 50 professional American Guild of Musical Artists (AGMA) Union dancers and was led by Ivan Nagy, an internationally renowned artistic director.

While the idea was a groundbreaking one, the community was not as receptive as both cities had hoped and it soon started accumulating large amounts of debt. By 1991, the partnership was terminated. The Board of Directors was cut nearly in half from 63 members to 35 and those remaining began to take a much more active role in the organization's management. Staff was also reduced to three key members: the general manager, an accountant, and a development associate. It was at this point the organization changed its name to the New Orleans Ballet Association and began building a solid reputation within the community, and later the country. By 1993, new records were set in earned revenue thanks to the prosperity of the 1990s resulting in a large increase in corporate giving. Their success was also assisted by the organization's new community

centered approach to presentation and educational programming assisted. The Association was able to fully retire its debt by 1995 and has been able to remain financially stable to this day.

### **Mission**

NOBA's mission statement is, "to cultivate understanding, appreciation, and enjoyment of dance through performance, education, and community service." In line with this mission, NOBA defines its top priorities as:

- 1) to make dance a core component of life-long learning;
- 2) present high caliber international, national, and local dance;
- 3) facilitate access to and participation in dance;
- 4) provide a conduit to a greater understanding of the art of dance; and
- 5) build partnerships and collaborations to further foster the above stated mission and priorities.

To accomplish these objectives, NOBA divides its programming into two major categories:

- 1) Main Stage: the concert presentation of dance companies of local/ national/ international acclaim through annual artistic programming.
- 2) Education: the accessibility of dance as a living art form at a local/ state/ regional level through Education Programs.



## **Programs and Activities**

### *Main Stage:*

Since 1989, NOBA has presented 110 companies in 219 concerts on the Main Stage. The 2006-07 season was the first ever sold out season for the New Orleans Ballet Association, and the 2007-08 season also reached sold out capacity. To illustrate the diversity NOBA strives to present, for their 2008-09 season, NOBA presented Ballet Hispanico, a contemporary dance company based on traditional Latin dance in October; the Trey McIntyre Project, a newly formed experimental ballet company, with the Preservation Hall Jazz Band in November; company members of the New York City Ballet and the San Francisco Ballet in January as well as Cedar Lake Contemporary Ballet; the Houston Ballet's Marie Antoinette in March; and Diavolo, a highly athletic company whose pieces incorporate elaborate set designs in May [see Appendix A]. NOBA presents each company at one of three primary venues depending on the size and type of production. These are Tulane University's Dixon Hall, the New Orleans Center for Creative Arts Riverfront's Nim's Blackbox Theater, and the recently re-opened Mahalia Jackson Theater for the Performing Arts.

Laura Burkhardt, NOBA's Marketing and Booking Manager, says constructing a successful season is like putting together pieces of a puzzle. Many different factors must be taken into consideration. Questions such as whether the community will be receptive to a specific type of company, the cost of presenting them, the company's technical needs, when they are available to tour, and most importantly, the quality of the performance come into play for each season. She and Jenny Hamilton, the Executive Director work hard to find the right mix of diversity in dance, company size, cost, and

artistic complexity for each season. Another recent development in NOBA's main stage programming has been the shift from Tulane University's Dixon Hall in Uptown New Orleans to the Mahalia Jackson Theater for Performing Arts located downtown. The Mahlia recently reopened in January 2009 after three and half years of being closed due to the damage incurred during Hurricane Katrina..

### *Education Programs:*

The NOBA Education Programs are provided among three platforms: 1) life long learning/cultural literacy for all ages; 2) professional development; 3) student arts education programs (K-12). Their eclectic roster of classes aims to increase the understanding of dance through a wide variety of activities available to all ages and segments of the community.

There are two major components to NOBA's education programs. These are in-school in the form of artist residencies, performances, and lecture/demonstrations and after school in the form of dance classes and family outreach activities.

In-School: NOBA brings dance directly into their participating partner schools through assemblies, teacher training workshops, and study guides. National and local dance artists provide 50-minute performances. NOBA connects with the classroom teachers at area schools by providing study guides to enhance each dance experience and training workshops to instill confidence and understanding on how to incorporate dance into the classroom environment. There has been a marked increase in their after-school program because of NOBA's presence in its three partner schools, Mary Bethune

Elementary (New Orleans), Lake Forest Elementary (Orleans East), and Pheobe Hearst Elementary (Metairie).

After-School: In 1992, NOBA and the New Orleans Recreation Department (NORD) formed a groundbreaking partnership, the NORD/NOBA Center For Dance, to offer free dance classes to any child, ages 6-18. The program provides a variety of training to more than 200 youth per semester from the recreational to the pre-professional level at nine sites in and around the city. Participation enables students to successfully audition for entrance to performing arts high schools, universities, summer intensives, and conservatories. NOBA collaborates with Tulane University, Loyola University, schools, and local performance companies. The program provides training with dance professionals, performance experiences (10-15 annually), guest artist master classes (6-7 annually), 1-2 week artist residencies (1-2 annually), touring experience and work with local psychologists and nutritionists. Classes and performances take place at Tulane University.

The after-school curriculum and ancillary activities consist of a broad roster of age-appropriate activities that reflect the program's predominantly African American constituents. Activities include creative movement, traditional African dance, drumming, modern dance, tap, and basic ballet training. Children ages 6-18 are eligible for enrollment and have the opportunity to move forward through the program to more advanced level sites as they meet the standardized learning/performance advancement indicators. These after-school activities are taught twice per week using a 1-1.5 hour class structure. Classes consist of 1) warm-up; 2) movement across the floor and through space; 3) improvisation and choreography; 4) cool down; and 5) Healthy Kids activity

that reinforces self-management, nutrition, and fitness concepts. A healthy snack is provided at the end of each class to reinforce the importance of individual healthy eating choices and the impact on individual well-being.

NOBA also offers a pre-professional program which consists of four levels of 6-7 ballet and modern classes taught weekly for students with demonstrated talent, ages 9-18. It is a tuition-free, year-round program for inner-city youth with demonstrated talent in dance. Students at the highest level audition for a company experience which provides exposure to life as a professional dancer. NOBA also provides a Summer Intensive program with three levels of 15-20 ballet and modern classes taught weekly. The program culminates with a public performance which features students in concert with a guest company.

Nationally, NOBA is recognized for examples of “best practices” for programming, curriculum, and innovative partnerships [see Appendix B]. Its programs have been honored by the 2009 selection as one of 9 pilot sites for the Creative Aging Program by the National Guild of Community Schools of the Arts; 2001 Selection as one of 20 pilot sites for the National Endowment for the Arts (NEA) and US Department of Housing and Urban Development (HUD) Creative Communities Program; 2002 Coming Up Taller Award from the President’s Committee on the Arts and Humanities; 2004 Selection as 1 of 8 pilot programs and 2005, 2006, 2007 participant for the National Endowment for the Arts Summer Schools in the Arts program; and 2005 Kennedy Center Partners in Education. Post-Katrina, NOBA and its partner programs have continued to garner national recognition and conduct major activities to benefit the entire region. These include: Keynote Speaker at the National Dance Education Organization (NDEO)

Conference, June 2007; NORD/NOBA Center For Dance to perform on the Inside/Out Stage of Jacob's Pillow, June 2007; Millennium Stage of the Kennedy Center, June 2008; Dance at Noon for Piccolo Spoleto, May 2009; and soliciting and distributing more than \$300,000 worth of dance supplies to more than 800 recipients in three states.

## **Administrative Structure**

### *Staff:*

NOBA is a 501(c)3 non-profit organization and as such, has a board of directors, and an executive director. NOBA also employs five full-time and two part-time employees responsible for the management of the finance, box office, educational outreach, marketing, and development of the organization [see Appendix C]. Given the complexity and breadth of NOBA's programming in comparison to its relatively small staff, each administrative position involves a great deal of collaboration with other staff members.

- Jenny Hamilton, the Executive Director, oversees and manages almost all areas of the organization, including its artistic, administrative, financial, and marketing components. She is also the chief fundraiser for the organization and guides its capital campaign, endowment decisions, planned giving, and grant-writing. Hamilton also works very closely with the Board of Directors and BRAVO, NOBA's "Ballet Resource and Volunteer Network."
- Suzanne Hirsch, the Director of Education, oversees all education programming including in-school artist residencies and after school programs at nine sites

across the city, as well as the NORD/NOBA Center for Dance. She also works with the Director on grant-writing and foundation proposals.

- Sandra Fank, the Director of Finance, oversees all financial operations for the organization and works closely with the Box Office Manager on ticket revenue and production needs. She is also responsible for coordinating human resource needs and administering the payroll.
- Laura Burkhardt, the Marketing and Booking Manager is responsible for scheduling each Main Stage season, negotiating contracts with each company, and a majority of the production decisions. She also works with the Communications Manager to design marketing materials.
- Jessica Brown, the Communications Manager, is responsible for managing all press coverage, creating marketing materials, and more generally communicating the image and brand of NOBA to the surrounding community. She is also responsible for maintaining NOBA's website.
- Caitlyn Williams, the Development Associate, is responsible for the press, materials, and organization of all special events such as the annual gala, Men and Women of Fashion meetings and events, and the annual luncheon.
- Wanda Fulton, the Box Office Manager, handles all ticket sales and box office duties using the Choice database system. She also oversees the day-to-day activities of the office such as ordering office supplies.

NOBA also employs two resident artists for its education programs. It contracts with 100 stagehands and a technical director by project through its productions. Additionally, NOBA works with local universities to employ interns (2-4 annually).

*Board:*

NOBA is governed by a 35 member Board of Directors, consisting of Chair, Cynthia Lebreton, Vice Chair (Board Development), John Duck, Vice Chair (Administration), Constance Willems, Vice Chair (Governance), Michael Alladay, Treasurer, Guy Brierre, Secretary, Maria Bonilla, and two lifetime members Nancy O’Connell and Phyllis Taylor [see Appendix D]. They are also organized into standing committees which oversee five critical areas of internal (Board-related) and external (NOBA-related) development: Finance, Development, Planning, Board Membership, and Education.

While the Executive Director works closely with the Board to keep them abreast of all important developments, they typically take a more “hands off” approach to the management of the organization by leaving all major decisions to the Director. The primary responsibilities of the Board fall more in the scope of fundraising, as outlined by their self-created guidelines. Specifically these are to:

1. Subscribe to the full season and attend all performances presented by the New Orleans Ballet Association.
2. Attend Board of Directors meetings.
3. Participate on at least one of the five standing committees of the board.
4. Support BRAVO functions (Annual Gala, Spring Luncheon)
5. Make a personal contribution at the suggested level of \$1,000 to the general operating funds of the New Orleans Ballet Association or BRAVO.
6. Actively participate in the development (fundraising) activities of the annual campaign to help raise the funds necessary for the operations of the organization by

inviting potential contributors to cultivation events, providing contact names and making calls with staff to solicit cash or in-kind donations, and signing off on solicitation letters to friends and colleagues.

7. Support the education and community service programs of the organization by attending Open Houses of our after school dance programs, providing contacts, helping staff establish partnerships, attending in-school activities, etc.
9. Support the marketing effort where possible.
10. Be an advocate for the organization.

*Volunteers:*

One of NOBA's more unique features of its management structure is its well-developed and extensive network of volunteers, called the Ballet Resource and Volunteer Organization (BRAVO). BRAVO consists of a large group of members who contribute to NOBA through donations and membership dues. As a group, they are the largest single donor to the organization and thus are vital to the organization's financial stability. Members also contribute their time by hosting meetings and fundraisers and are responsible for the organization and planning of NOBA's largest fundraiser, their annual gala and silent auction. Much like the Board, BRAVO functions with its own set of officers and steering committees which are responsible for the planning and coordinating of the events mentioned above.

In addition to BRAVOS efforts, NOBA is supported by the Women of Fashion (WOF), a group of women dedicated to recognizing those in the community who exemplify personal style and community service. WOF hosts an annual spring luncheon



for new members who are first conferred an award called “Prix d’Elegance.” All proceeds from this well-attended luncheon have been donated to NOBA since 2006.

## **Financial Structure**

### *Income:*

NOBA has an annual budget of approximately \$1,300,000 [see Appendix E]. Roughly 30% of this income is earned revenue from ticket sales and contracted services, while the other 70% comes from corporate, foundation, government, and individual support.

Much of NOBA’s corporate support is primarily through sponsorships where corporations usually pay somewhere in the \$5,000-\$10,000 range for logo placement on all of Main Stage productions’ printed materials. These sponsorships can also come in the form of in-kind contributions such as airline tickets and hotel rooms. For the 2008-09 season NOBA was sponsored by Delta Airlines, Sheraton New Orleans, AT&T, El Tiempo New Orleans, Capitol One, Energy Partners Ltd., New Orleans Jazz & Heritage Fest, and the New Orleans Musicians Clinic, among others. Some corporations also have charitable arms which distribute grant money either directly through the company or through a large area foundation such as the Greater New Orleans Foundation. NOBA has recently applied for grants from Entergy, Harrah’s, and Starbucks.

In terms of foundation support, NOBA receives both charitable donations and grant money. One of the more recent solicited donations came from the Surdna Foundation which in Fall of 2008 donated \$100,000 to the organization to be dispersed over a period of four years to support NOBA’s pre-professional program. Other major foundation

fundes include the Lupin Foundation, the RosaMary Foundation, and the Wisner Foundation. NOBA also applies for roughly 40 foundation grants a year, and are awarded approximately 10%, a very high average for non-profit arts organizations.

Over the past decade, NOBA has received considerable support from the National Endowment of the Arts (although the award has slowly decreased each year since the storm), the Louisiana Division of the Arts (in the form of Stabilization, Capacity Building, and Arts-In-Education grants), the Southern Arts Federation, the Arts Council of New Orleans, and the City of New Orleans.

Other sources of income for NOBA are its endowment, now valued at around \$130,000 (after a \$20,000 dollar loss due to the current economic recession), the annual gala which generates about \$60,000 in direct funds, the Women of Fashion luncheon which generates about \$40,000 in direct funds, and donations from individuals on the board and in the community at large.

#### *Expenses:*

NOBA's primary expense is the salary of its administrative, artistic, and production staff including their concordant taxes and benefits [see Appendix E]. This accounts for about 70% of its budget. Marketing, supplies, and travel make up another 20%. Production, equipment rental, insurance, postage and shipping, and development account for the final 10%. NOBA has been able to successfully stay within its budget for the past three years and was even able to generate a surplus in 2007 applied to the deficit incurred in 2006 for substantial losses resulting from the Storm. NOBA also holds a \$1 million dollar cash reserve for emergency expense.

## **CHAPTER TWO**

### **THE INTERNSHIP**

Throughout the course of my internship my primary duties were related to the construction of grant proposals. I also attended every Main Stage production presented that spring, and occasionally worked the will call and box office positions. I was also often included in the brainstorming of marketing and production decisions. However, I never strayed far from the development arm of the organization. Over the course of the internship, I had a role in the completion of over 40 grants, from very involved, large national government grants that requested many thousands of dollars, to simple one page letters to private local foundations that asked for no more than several hundred dollars.

As NOBA is highly dependent on the grant money they receive each year to fund both their operating and programmatic expenses, the grant-writing process has become very organized and routine and is categorized by several yearly cycles. Roughly a quarter of formal grant deadlines fall in early autumn (September and October). However, the majority of grant deadlines occur in each month of spring, with many grants due in mid-late January, early February, early March, early April, and both the beginning and end of May. I thus entered the internship at a very important and hectic time within this cycle and was afforded the opportunity to follow and participate in a variety of different types of grants from beginning to end.

Many of the grants we completed were administered through private foundations. These included the Keller Family Foundation (\$15,000), the Peyback Foundation (\$10,000), the Mary Freeman Wisdom Foundation (\$10,000), and the Junior League of

New Orleans (\$4000). Often private foundations are formed by a wealthy family to donate money to social causes they are particularly interested in furthering. These can vary from causes such as education or arts and culture, or aiding the residents of the geographic locations they hail from.

I also worked on several proposals for charitable giving programs administered by various corporations. To better their reputation in the communities they operate, many corporations provide funding, in-kind donations, or volunteer programs to non-profit organizations and schools. During my internship I assisted in applications to Entergy's Community Partnership Grants program (\$20,000), Target's Arts Organization Grant program (\$5,000), the Community Coffee Fund (\$20,000), the Harrah's Foundation Charitable Giving program (\$10,000), and the Starbucks COAST Fund (\$10,000- specifically for organizations helping to rebuild the Gulf Coast after Hurricane Katrina).

The largest category of grants to which I devoted my time were grants administered through government agencies at the city, state, and national level. In January of 2009, the City of New Orleans announced the availability of large amounts of funds through a grant called SuperNOFA (Notice of Funding Availability), an extension of their annual Neighborhood 1 grant. The grant is part of the City's Consolidated Plan, now in the fourth year of five years, and its purpose is to administer funds supplied through the U.S. Department of Housing and Development.<sup>1</sup> To apply for the grant, NOBA had to first register with the Office of Recovery and Development's Registry of Non-Profit Organizations in 2008 to make sure they met basic eligibility requirements. The funds support four different city initiatives: 1) housing for people with AIDS, 2) improving homeless shelters and homeless prevention activities, 3) increasing the supply

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<sup>1</sup> "2009 General Application Packet for SuperNOFA," *City of New Orleans*

of decent, affordable housing for low-income families, 4) and public service activities for youth enhancement, literacy/education, and senior citizens in areas where 51% of the population live below the poverty line. This last grant category, called Community Development Block Grants, is the category NOBA applied to. The funds were requested to maintain dance education programming at the six existing New Orleans Recreation Department Centers in Orleans Parish, and to return programming to a seventh center in the Treme neighborhood. NOBA has been awarded significant grants in two of the last three funding cycles of this program (\$34,617 in 2007 and \$59,617 in 2008) so this year they decided to request \$100,000.

The next major category of government grants I worked on were administered by the Arts Council of New Orleans (ACNO). While the Council is a private, non-profit organization, it is the City's designated arts agency. As such it works in partnership with the city to manage grant programs, create public art programs, run a monthly art market, and serve as an advocate for public policy that supports the arts.<sup>2</sup> There are two grant programs administered through ACNO: the Community Arts Grant and Louisiana Decentralized Funding. Each offers various levels of operating support, project assistance, and technical assistance. Together with Suzanne Hirsch, we composed a general operating support proposal and project assistance proposal for NOBA; project assistance and technical assistance proposals for Friends of NORD (a non-profit organization that works to improve the New Orleans Recreation Department); and a technical assistance grant for the St. Benilde Church in Jefferson Parish, one of the locations for after-school dance programming.

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<sup>2</sup> "About the Arts Council," *Arts Council of New Orleans*, 3/9/09  
< <http://www.artscouncilofneworleans.org/article.php?story=about.whoweare>>

On the state level, we applied to several Louisiana Division of the Arts (LDOA) grants. The LDOA is a subsector of the Lieutenant Governor of Louisiana's Office. We applied to three different grants for the 2010 year. We applied to a Capacity-Building grant (\$15,000) to assist in implementing a new strategic plan for the organization [see Appendix F]; priorities of which include re-designing the website, marketing the organization through the use of social media tools, and beginning a new development campaign through online resources. We also applied to a Stabilization grant (\$45,000) to support general operating expenses. Finally, we applied to an Arts-In-Education grant (\$15,000) to support the In-Motion Artist-in-Residency elementary school program.

The Louisiana Cultural Economy Foundation is also a subsector of the Lieutenant Governor's Office. Through them, we applied to an Economic Opportunity Fund grant (\$5,000) designed to "increase the entrepreneurial capacity and economic health of cultural economy stakeholders."<sup>3</sup> The proposal was written to help NOBA implement a new marketing initiative they had recently designed during the process of strategic planning. This was to contract with an entertainment marketing firm, Allied Live, to assist NOBA in breaking into social medias such as YouTube, MySpace, blogging, and other online outlets. It was also to garner support for the redesign of the NOBA website to increase its functionality and provide greater resources to stakeholders and the community at large.

The most substantial grants I had the opportunity to work on, both in submission requirements and the amount of money they requested, were through the National Endowment of the Arts (NEA). The first was the NEA's annual "Access to Artistic

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<sup>3</sup> "Guidelines for Economic Opportunity Fund," Louisiana Cultural Economy Foundation, 3/9/09  
< <http://www.cultureconomy.org/article.php?story=guidelines>>

Excellence” grant (\$150,000) which was designed to facilitate the creation or presentation of significant works of art or cultural traditions. The proposal requested funds for offsetting the artistic fees of the companies NOBA hoped would compose their diverse season of 2010 Main Stage presentation and outreach activities. These were the Alvin Ailey American Dance Theater, Les Ballet Trockadero (a company of all male pointe dancers), Les Grands Ballet Canadiens, Jant-Bi (an African dance company), and for the second year in a row, the Trey McIntyre Project. As the 2010 line-up will be NOBA’s most expensive season since Hurricane Katrina, the funds requested from the NEA are essential in ensuring it comes to fruition.

The second NEA grant I worked on was a newly-created fund, called the “Recovery Act” fund, which was formed in response to the \$50 million funneled into the non-profit sector by the Obama Administration through the creation of the Arts and the American Recovery and Reinvestment Act of 2009. This was one of Obama’s first major economic initiatives while in office.<sup>4</sup> The grant’s purpose is to create job stability in the non-profit arts sector. It was thus made available to support the cost of administrative staff salaries and artistic fees incurred by private, non-profit organizations. State arts agencies and regional arts organizations could also apply for funds to disperse to smaller organizations within their individual communities to serve this same purpose.<sup>5</sup>

One of the major requirements for eligibility for the Recovery grant is that the organization applying has been awarded an NEA grant sometime in the past four years.

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<sup>4</sup> “The Arts and the American Recovery and Reinvestment Act of 2009, Public Law 111,” *National Endowment for the Arts*, 3/9/09

<http://www.nea.gov/Grants/apply/recovery/index.html>

<sup>5</sup>“National Endowment for the Arts Implementing Plans for the American Recovery and Reinvestment Act of 2009,” *National Endowment for the Arts*, 3/9/09

<<http://www.nea.gov/recovery/NEA-recovery-agency-plan.html>>

Luckily, NOBA was able to firmly solidify their relationship with the NEA during evacuation for Hurricane Katrina. While operating solely from her home in La Place, Louisiana, and without an internet connection, Ms. Hirsch was able to submit NOBA's 2005 funding request to the NEA by keeping in constant touch with them through the phone. The NEA must have been impressed by her dedication during such a tremulous time as they awarded her a grant, although it was much less than what she requested as they were uncertain whether NOBA could indeed meet the objectives of the proposal when the future of the city and the organization were so uncertain. NOBA was able to meet all the goals of the grant by operating out of community centers in parishes outside the city to provide free dance classes to displaced children. They were therefore able to earn the respect and confidence of the NEA. They have been one of NOBA's major annual funders ever since.

I also helped Ms. Hirsch compose several mid-year and final reports, which are requirements of many government grants and some private foundation grants. These reports detail what has been completed thus far, whether the activities detailed in the initial proposal were carried out, and if any aspects of the project or plan were altered since funding had been received. Many grantors also require these reports so that they may use them to determine whether the organization is worthy of future funding. NOBA is therefore very diligent when it comes to reporting. They often conduct surveys and evaluations in many of their programs so that they may provide hard data to demonstrate they are meeting their proposed objectives. During my internship I completed final reports for the Arts Council of New Orleans (awarded \$21,440 in 2008) and the National Endowment for the Arts Access to Creativity grant (awarded \$30,000 in 2008); as well as



interim reports for Met Life (\$15,000) and the Surdna Foundation (\$225,000 over three years).

I also conducted research on corporate sponsors in the area by going through past donor files to see what area businesses had sponsored or donated to NOBA since Katrina. I then researched the appropriate contact person for each company (generally the head of each company's Community Affairs department) and compiled a list from which Jenny Hamilton would later use to schedule appointments. Ordinarily NOBA writes letters or creates sponsorship proposals to send to each company. However, Ms. Hamilton said that in 2009's current economic crisis where many corporations were losing profits and therefore had considerably less "expendable" income to donate, it would take more effort than usual on NOBA's part to secure the same level of corporate donations as in years past. While at the time this report was written, Ms. Hamilton had only completed one in-person meeting, with the Director of Corporate Giving at Entergy, the meeting was a success and resulted in special consideration of a grant NOBA had recently submitted to them.

I also began seriously researching the Americorps programs available to non-profits to staff community programming. The American Recovery and Reinvestment Act, mentioned above, also includes \$201 million in funding for the Corporation for National and Community Service to support an expansion of AmeriCorps State and National and AmeriCorps VISTA programs. Americorps devoted more than \$15 million to Louisiana alone in 2008.<sup>6</sup> Ms. Hamilton suggested NOBA begin looking into securing Americorps

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<sup>6</sup> "Louisiana at a Glance," Corporation for National & Community Service, 3/9/09  
<[http://www.nationalservice.gov/state\\_profiles/pdf/LA\\_GL.pdf](http://www.nationalservice.gov/state_profiles/pdf/LA_GL.pdf)>

members for their 2010 Summer Education programs, which will be applied to through the Louisiana Lieutenant Governor's Office *Learn and Serve* division.

### **CHAPTER THREE**

#### **S.W.O.T. ANALYSIS**

A S.W.O.T. analysis, or situational analysis, is an important tool in assessing both the current health of a non-profit organization and its success in executing its mission. A S.W.O.T. analysis, which considers an organization's strengths, weaknesses, opportunities, and threats, is often conducted in the first stages of the strategic planning process. Not only does it illustrate an organization's current status and position but it also useful in developing future goals and objectives to which the organization can strive for. Strengths and weaknesses are internal and thus are usually areas the organization can control. Opportunities and threats are issues present in an organization's external environment and therefore not typically able to be changed by the organization. Nonetheless, they should be aware of and managed as well as possible.<sup>7</sup>

The following chapter presents the results of a S.W.O.T. analysis conducted on the New Orleans Ballet Association which closely examines its current methods for fundraising and financial development. It also evaluates their efficacy within the larger context of the nation's current economic climate, which at the time of this internship is substantially depressed. Finally, it discusses ways in which NOBA's strengths and opportunities could be further developed or capitalized on and how weaknesses and threats could be corrected, avoided, or neutralized.

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<sup>7</sup> Simone P. Joyaux, "Chapter Three: The Second Relationship- With Your Community," *Strategic Fund Development*, 70.

**Strengths:**

- Outstanding fiscal management
- Strong membership base
- Large number of small gifts through individual donors
- Well-established annual fundraising events
- Aggressive grant-writing campaign
- Well-established relationships with local corporate donors
- Well-established partnerships with other local institutions

**Weaknesses:**

- No capital campaign in place for the purchase of a permanent home
- Relatively small endowment
- Few strong relationships with large individual donors
- Number of corporate sponsors has dwindled in past decade
- Staff too small to research and pursue additional potential development opportunities

**Opportunities:**

- Region in a Post-Storm Recovery Economy
- No other large organization devoted solely to presentation of dance in the region
- The proliferation of social media

**Threats:**

- U.S. economy in a large recession
- State arts funding not a priority of current Governor of Louisiana
- Dance is typically lowest-attended, most expensive artistic event to produce

## Strengths

*Outstanding Fiscal Management:* In a recent interview with Suzanne Hirsch, she attributed much of NOBA's financial stability to their "active" rather than "reactive" approach to programming and fundraising. She said NOBA's staff work tirelessly to first, fill needs they see in the community they serve, and *then* seek appropriate funding to support these initiatives. She attributes much of the poor financial planning she sees in some of the city's other non-profits to seeking funding first and then tailoring programs to fit this funding instead of its beneficiaries. NOBA's staff refuses to compromise the integrity of their mission and have even rejected money from funders in the past who have asked them to alter programming in a significant way to meet particular funding requirements. NOBA's philosophy seems to be a wise one as their year-end surplus usually averages around \$60,000. And from 1995 (the point in time when NOBA was able to fully retire its debt) to today, it has been able to build up a one million dollar cash reserve, to be used only for the purposes of "catastrophic emergencies" and "artistic excellence" (to cover artistic fees for the presentation of especially large and well-known dance companies).

*Strong membership base:* Through aggressive and creative marketing and positioning as well as the quality of their programming, NOBA has been able to build a membership base of over 25,000 constituents. Jenny Hamilton and Laura Burkhardt strive to feature an internationally, ethnically, and artistically diverse line-up of dance companies each season. A typical season can include everything from Flamenco to mixed media contemporary dance to classical ballet so that generally, at least one performance each year appeals to every member. At the beginning of each season, direct mail pieces are sent to everyone in the membership database detailing each Main Stage production,

ticket prices, and subscription information. One or two months before each performance, individual direct mail pieces are again sent out, as well as email blasts and group ticket incentives to surrounding businesses and schools. As a result, the past three seasons have generally sold out each performance weeks ahead and the 2008-09 season is promising to be no exception.

*Large number of small gifts through individual donors:* There are a great many small gifts donated to NOBA each year. These gifts are secured through an annual campaign; from members who want to ensure the continued quality of presentations, as well as through parents who are thankful for NOBA's free in-school and after-school education programs. Individuals can pledge on a one time or monthly basis [see appendixes G and H].

*Well-established annual fundraising events:* Since it was first held in 1979, NOBA's annual gala has become a popular event for wealthy New Orleanians and has an average yearly attendance of 300. Often, yearly fundraising events such as galas can wane in popularity as the community in which they are held tires of them. To avoid this, NOBA works hard to ensure each year's experience is different from the last. They accomplish this by selecting a new theme and location to correspond with one of the season's larger productions. For instance, for the 2009 gala, a theme of "Marie Antoinette" was selected in conjunction with the world premiere of "Marie," a classical ballet by the Houston Ballet presented later that month. Attendees of the gala had the option of dressing in typical evening attire or in 18<sup>th</sup> century period costume. NOBA also attempts to secure new sponsors for the silent auction each year, which generally includes jewelry, trips, and gift certificates to area businesses. Additionally, NOBA stages several

patron parties and dinners throughout the year and almost every performance is accompanied by a (more expensive) option to attend a VIP cocktail party either before, during, or after the show.

*Aggressive grant-writing campaign:* NOBA applies to over 50 grants a year through both public and private funders. They also constantly research potential new grants to add to their cycle. On top of the sheer number of grant opportunities pursued, NOBA has an unusually high success rate of obtaining grant money. Generally, they receive some portion of the funds they request from about 35% of the grants for which they apply. This success can probably be attributed to NOBA's rigorous data-collection, which specifically demonstrates the characteristics of the communities they are serving and the effects their programming has on its participants.

*Well-established relationships with local corporate donors:* Over the past decade, NOBA has been able to successfully build solid relationships with several local corporations. These relationships are primarily with oil and energy companies common to the Gulf South, such as the regional branch of ExxonMobil, Chevron, Schlumberger Oilfield, Inc, Entergy, and Energy Partners, Ltd. Each corporation regularly provides the organization with \$5,000-\$10,000 donations for educational programming or if times are tight, will at least agree to sponsor a Main Stage production.

*Well-established partnerships with local institutions:* NOBA prides itself on its 16 year partnership with the New Orleans Department of Recreation (NORD), which has helped house and fund their after-school education programming since its inception in 1992. NOBA also has a strong partnership with Tulane University, which provides studio space for NOBA's pre-professional program. Tulane's Dixon Hall also provided NOBA

with a temporary home throughout the three years it took to rebuild the Mahalia Jackson Theater after Katrina. NOBA has additional partnerships in place with Dillard University and the three elementary schools in which it conducts its in-school residency programs. These partnerships help NOBA share resources and thus lessen expenses. They also aid in attracting funders, specifically grant-makers, who have a reputation for favoring projects that involve the participation of more than just one organization in a community.

### **Weaknesses**

*No capital campaign in place for the purchase of a permanent home:* A capital campaign, as defined by Ciconte and Jacob in their text *Fundraising Basics*, is “an intensive fundraising effort organized to meet a specific financial goal within a specified period of time for one or more major special projects such as the construction of a facility or the purchase of equipment.”<sup>8</sup> One of NOBA’s major goals right now is to secure a permanent home that can accommodate both administrative offices and studio space for their pre-professional program. While the design of an effective capital campaign is one important objective of the current strategic planning process taking place this Spring, NOBA is hoping to find and purchase such a space by this summer. A capital campaign should have been in place long ago not only to help with the initial purchase of the space but to avoid delaying the potentially very expensive renovations required to tailor it to NOBA’s unconventional needs. This is especially important when considering a successful campaign can take anywhere between six months to several years.<sup>9</sup> In the

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<sup>8</sup> Barbara L. Ciconte and Jeanne G. Jacob, “Chapter 14: Capital Campaigns,” *Fundraising Basics: A Complete Guide, Second Edition*, 291.

<sup>9</sup> Ciconte and Jacob, 298.



absence of previously set-aside funds for this project, the substantial amount of money needed to accomplish it may significantly weaken NOBA's current financial position.

*Relatively small endowment:* NOBA's endowment is currently worth around \$130,000 with a policy to reinvest earned interest.<sup>10</sup> The fund was established in 1996 through the endeavors of the National Endowment for the Arts, the Arts Council of New Orleans, and the Lupin Foundation. The Greater New Orleans Foundation manages the NOBA endowment. While it has taken a substantial hit with the major, recent decline of the stock market by about \$30,000, it is still not very large in comparison to other organizations NOBA's size. National Arts Stabilization, an independent organization dedicated to improving the long-term stability of arts organizations, suggests that organizations interested in establishing an investment reserve try to gather donor-restricted endowment funds and board-designated quasi-endowments into a sum that equals at least two years of total organizational expenditures.<sup>11</sup> The yearly interest payments from endowments are also extremely useful for the payment of operating expenses. These interest payments will be especially important to covering the cost of overhead once NOBA is able to acquire a permanent space for the organization.

*Few strong relationships with large individual donors:* NOBA has enjoyed a solid relationship with Phyllis Taylor, the wife of Patrick Taylor, the recently deceased owner of a large energy company in the city, for many years. She is a lifetime member on their board. The Taylor Foundation has donated many thousands of dollars to the organization over the years. Finally, the Taylor Energy Building currently provides substantially reduced rent to NOBA for the offices they occupy on the ground floor of the building.

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<sup>10</sup> *New Orleans Ballet Association Financial Statements*, June 20 2008 and 2007

<sup>11</sup> "The Capacity of Performing Arts Presenting Organizations," *Urban Institute*, 3/10/09  
<<http://www.urban.org/publications/410604.html>>

However, aside from Mrs. Taylor and a few others, NOBA has very few relationships with donors of this scale. Donors such as these could potentially contribute to those areas of NOBA's financial development that are weakest and that grantmakers usually will not fund: their endowment and a capital campaign.

*Number of corporate sponsors has dwindled in past decade:* While conducting research on corporate sponsors, I noticed that in the earlier part of the decade NOBA had a great many more corporate sponsors than they have today. The advent of Katrina is certainly to blame for some of this decline as many local businesses were forced to relocate or close entirely. However, even the number of national companies that once provided NOBA with sponsorship has decreased, most noticeably in the past two years. For instance, for almost 10 years, Delta supplied the organization with free air travel for many of the companies they presented on the Main Stage [see Appendix I]. They also supplied airfare for NOBA staff and students to attend conferences and present their work on national stages. While Delta is still listed as a major sponsor on NOBA's website [see Appendix J], the airline company has not supplied NOBA with an in-kind donation for the past three years. With the re-opening of the Mahalia Jackson Theater, NOBA's Main Stage productions now have the ability to hold almost 2300 patrons per night, all of whom will be given a program book which will display the logo of each of NOBA's key sponsors. Making former corporate funders aware of increased audience numbers may be one way to re-capture their valuable support.

*Staff too small to research and pursue additional potential development opportunities:* As evidenced above, NOBA has some very successful development practices in place and those they employ; they execute to their best of their ability. It is

clear, however, that every member of NOBA's small staff is at full capacity in completing daily duties. This leaves little time to even research potential avenues for fund development, let alone pursue them. This is especially clear when one realizes that the person responsible for almost all grant-writing and final reporting is also in charge of all aspects of NOBA's extensive education programming. It is evident NOBA needs to increase their staff size within the next year as the scope and planning of current programming and services have grown to a level beyond what the current staff can handle.

## **Opportunities**

*Region in a post-storm recovery economy:* So far, the unique dynamics of the New Orleans rebuilding process after Hurricane Katrina's landfall in August 2005 have kept the area largely protected from the extreme economic downturn marring the rest of the country. While the United States as a whole lost more than one million jobs, New Orleans added almost 6,000 jobs from May to November, 2008.<sup>12</sup> And while, the price of real estate fell by 9 percent around the country in the first three quarters of 2008, New Orleans was up 4.1 percent during this same period.<sup>13</sup> New Orleans may eventually begin to feel the effects of the country's current economic depression should it continue to persist much longer. But as the population has grown by 2% in the last six months alone (the metro area has reached almost 90% of its pre-storm population now),<sup>14</sup> it is probably safe to say New Orleans is insulated from an economic downturn within the next year.

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<sup>12</sup> "The New Orleans Index: Tracking the Recovery of New Orleans and the Metro Area," *Greater New Orleans Community Data Center*, January 2009, 7.

<sup>13</sup> Ibid

<sup>14</sup> "The New Orleans Index," 8.

*No other large organization devoted solely to presentation of dance in the region:*

NOBA fills a major cultural void in the Central Gulf Region in that they are the only organization devoted solely to the presentation of dance within a 350 mile radius. As such, they have little competition for ticket sales by dance patrons and even less for donors who take a special interest in dance.

*The proliferation of social media:* As mentioned previously, NOBA has expressed an interest in beginning to utilize the various social networks and online media tools that have witnessed an explosion in popularity in the past five years. Networks such as MySpace, Facebook, and YouTube enable business entities to more easily connect with potential constituents and more quickly disseminate and share information. This also creates the potential for increased earning. Tools such as these could help strengthen awareness of the organization on a national level as well as help it connect with younger generations, thereby securing future markets. According to a recent article by the Inquirer, these trends are sweeping the non-profit art world. The San Francisco Symphony posts interviews with its artists in high definition on its Facebook page. The Pittsburgh Cultural Trust has a YouTube channel on which it plugs the city's growing fine-arts community. The High Museum of Art in Atlanta actively uses Flickr, MySpace, YouTube, and Facebook accounts.<sup>15</sup> In this same article, Richard Cambrone, the Vice President of Marketing for the Philadelphia Orchestra says of the organization's recent decision to create a Facebook page, "When young people are exploring what they will do socially on their own, encouraging them to visit the orchestra is an incredibly valuable

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<sup>15</sup> Christopher Wink, "Phila art scene goes where youth are," *The Inquirer*, 2/24/09  
<[http://www.philly.com/inquirer/magazine/20090224\\_Phila\\_\\_fine\\_arts\\_scene\\_goes\\_where\\_youth\\_are](http://www.philly.com/inquirer/magazine/20090224_Phila__fine_arts_scene_goes_where_youth_are)>

seed for the future." Social media is also appealing in that it is little to no cost to use, differentiating it even further from most other forms of online marketing.

## Threats

*U.S economy in a large recession:* The current economic crisis did not surface until late in 2008, therefore many companies did not experience serious effects until 2009. Of 158 companies polled by the economic-research group the Conference Board in February, 45 percent said they have reduced their 2009 philanthropy budget and 16 percent are considering it. The survey said 35 percent of the companies will make fewer grants in 2009 and 22 percent are thinking about it.<sup>16</sup> In a recent article in the Wall Street Journal it was revealed that the New York City Ballet's Ballet Master in Chief, Peter Martins, has let go 11 members of the corps to alleviate the company's current financial crisis. Ticket sales and donations are both down about 6 percent to 8 percent causing a major shortfall in revenue, and the company expects to record a \$5.5 million deficit this season, even with extra cost-cutting measures.<sup>17</sup> Many other non-profit organizations around the country are currently facing this same difficulty. While NOBA has not felt serious effects from the recession as of yet, it is something they must be sensitive to and plan for nonetheless.

*State arts funding not a priority of current Governor of Louisiana:* In his 2009/10 State Budget, Governor Bobby Jindal has significantly reduced state arts funding. The Decentralized Arts Funding Program, a unique program for funding arts and cultural

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<sup>16</sup> "The Conference Board Finds the Economic Downturn Will Have Major Effects on Corporate Philanthropy," *The Conference Board*, 3/3/09

< [http://www.conference-board.org/utilities/pressDetail.cfm?press\\_ID=3595](http://www.conference-board.org/utilities/pressDetail.cfm?press_ID=3595)>

<sup>17</sup> Terry Teachout, "Ballet? Never Heard of it.," *The Wall Street Journal Online, Leisure & Arts*, 3/7/09  
<<http://www.opinionjournal.com/la/?id=110009307>>

activities on a per capita basis across the state, faces an 83% cutback and the Statewide Arts Grants faces a 31% cutback.<sup>18</sup> The DAF, administered through the Louisiana Division of the Arts, stimulates arts programming in each of Louisiana's 64 parishes, with competition and funding priorities happening at the local level. Parishes are supported on a per capita basis. The DAF awarded 424 grants across all parishes during fiscal year 2008. It benefited over 3.3 million citizens and visitors, and contributed \$6 dollars to state coffers for every \$1 invested.<sup>19</sup> The SAG program, administered through the Arts Council of New Orleans, creates jobs in the cultural economy and empowers entrepreneurial capacity in the cultural workforce. The statewide programs employ solid stabilization and capacity building strategies to improve the health of the non-profit organizations that fuel many cultural economy jobs.

Jindal also recently actively opposed President Obama's American Recovery and Reinvestment Act that would funnel \$50 million dollars into the National Endowment for the Arts to create job security for the non-profit arts sector. In January 2009, Jindal rejected almost \$100 million from the national government aimed at providing unemployment benefits to the jobless in Louisiana, money that also probably would have played a part in stimulating the state's economy.<sup>20</sup> Louisiana's Department of Culture, Recreation, and Tourism, in a 2004 report, showed that for every state tax dollar spent, \$5.86 is returned to the state treasury and citizens of Louisiana. From a national perspective, the nation's 100,000 nonprofit arts organizations and their audiences

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<sup>18</sup> "Arts & Cultural Funding in Jeopardy," *Arts Council of New Orleans*, 3/26/09  
<<http://www.artscouncilofneworleans.org/>>

<sup>19</sup> *ibid*

<sup>20</sup> Jan Moller, "Jindal rejects \$98 million in stimulus spending," 2/20/09  
<[http://www.nola.com/news/index.ssf/2009/02/jindal\\_rejects\\_32\\_million\\_in\\_s.html](http://www.nola.com/news/index.ssf/2009/02/jindal_rejects_32_million_in_s.html)>

generate \$166.2 billion annually in U.S. economic activity.<sup>21</sup> They support 5.7 million jobs and provide nearly \$30 billion in government revenue.<sup>22</sup>

Should the 2009/10 proposed state budget come to pass, NOBA may have to seek alternate funding to replace the large amount of money (on average, \$60,000 annually through both the LDOA and ACNO) they receive from these grant programs each year.

*Dance is typically lowest-attended, most expensive artistic event to produce:* In a study conducted recently by the Arts Council of England, it was discovered that in comparison to other arts events, dance is the least attended event, ranking just under opera and video/electronic art events in attendance rates.<sup>23</sup> According to the Survey of Public Participation in the Arts, conducted every 10 years by the National Endowment for the Arts, the percentage of Americans between the ages of 18 and 35 who attended one or more ballet performances a year fell from 5.0% in 1992 to 3.1% in 2002.<sup>24</sup> Of the 120 American dance companies that received grants from the NEA in 1986, 50% are no longer in existence.<sup>25</sup> Among these are such noted ensembles as Alwin Nikolais Dance Company, Chicago City Ballet, the Cleveland Ballet, Dance Theatre of Harlem, Feld Ballet, the Oakland Ballet Company and Twyla Tharp Dance.<sup>26</sup> Most of America's major museums and symphony orchestras have been in business for roughly a century; but only three American ballet companies—American Ballet Theater, New York City Ballet and

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<sup>21</sup> "Department of Culture, Recreation and Tourism Annual Report," *Lieutenant Governor of Louisiana*, 2004, 32.

<<http://www.crt.state.la.us/DocumentArchive/annualreport/2004annualreport.pdf>>

<sup>22</sup> "Department of Culture, Recreation and Tourism Annual Report," 33.

<sup>23</sup> "Dance participation and attendance in England, Findings from the Taking Part Survey" *Arts Council of England*, April 2008

<[http://www.artscouncil.org.uk/documents/projects/dance\\_phpRjBDLK.pdf](http://www.artscouncil.org.uk/documents/projects/dance_phpRjBDLK.pdf)>

<sup>24</sup> "Survey of Public Participation in the Arts," *National Endowment for the Arts*, 2002, 11.

<<http://www.nea.gov/research/NEASurvey2004.pdf>>

<sup>25</sup> "Survey of Public Participation in the Arts," 19.

<sup>26</sup> *Ibid.*

San Francisco Ballet—were founded prior to 1950.<sup>27</sup> This is why it is so critical for NOBA to begin trying to reach new, younger audiences within the community. They may already be one step ahead of other dance presenters by offering free and discounted performances to the youth who participate in their programming. However, it is still important for the organization to continue exploring other methods of making this connection, such as through the online social media tools mentioned above.

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<sup>27</sup> “Survey of Public Participation in the Arts,” 56.



## CHAPTER FOUR

### BEST PRACTICES

Recently, a great deal of research has circulated on best practices for fundraising in times of economic hardship. This chapter collects and reviews some of the more heavily circulated opinions, studies, and hypotheses on effective methods for fundraising in a recession. It also makes recommendations for future fundraising efforts for the New Orleans Ballet Association based on this research.

Recovery from the current recession is hard to predict. Forecasts made by financial experts have ranged anywhere from two months to two years. Therefore, an important question has recently surfaced: how will the ability of nonprofits to fundraise be affected? Non profits obviously cannot afford to put their needs on hold. In fact, some non-profit organizations, especially social service agencies, report that funding requirements are even greater in a soft economy because more and more people need help. And many non-profits are also suffering from federal, state and local governments, which are dealing with their own financial crises. Thus, nonprofits are potentially even more important during a recession because of the government's inability to respond as quickly and effectively to rising social and health problems.

In January 2008, when the effects of the current recession were first beginning to be felt, an article chronicling how the economy affects giving was published in the January/February issue of *Advancing Philanthropy*. In it, Bruce Flessner, a principal at a nonprofit consulting firm in Minneapolis, is quoted as saying,

*Many homeowners have felt very fortunate and able to give due to the housing boom earlier this decade. The growth in wealth at the household level was nothing less than astonishing and was driven by large gains in home equity. That period has now come to an end. Many of these same households now worry about*

*the loss of value within their most valuable asset. This reverse-wealth effect will most likely curb the appetite for charitable giving in the months ahead. To average Americans, the fear of losing their jobs may make them more careful about extending themselves but for the wealthy, it is about how much they are going to give this year, not whether they are going to give. And since the new generation of entrepreneurs and their first-generation wealth is what is driving new philanthropy, a growing economy makes these men and women more comfortable with disposing of their assets. Therefore, their perceptions of the economy are important.*<sup>28</sup>

Despite these negative connotations, the article does go on to state that economists and nonprofit advisors are confident that there will never be a complete stagnation in charitable giving no matter how bad the economy gets. It also states most nonprofits will be able to weather the financial storm if they develop well-planned strategies to compensate for decreases in giving.<sup>29</sup>

In an article published in March 2008 by *The Center for Association Leadership*, it is maintained that the best way to fundraise during an economic downturn is to return to basic strategies.<sup>30</sup> The article recommends five actions. The first is to make sure there is a strong case for support so donors know where the money is going and that it is making an impact. The second is to recognize that recessions make funding all the more crucial. Nonprofits must communicate how community needs are increased during a recession. The third is to focus on the annual donor. It is smaller gifts by many loyal donors that add up and are generally more flexible in where their money can be used than those making larger gifts. The fourth method is to remember that corporate donations are the first to decline in a recession. Instead of chasing big gifts from corporations,

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<sup>28</sup> Paul Lagasse, "The Shifting Bottom Line: How the Economy Affects Giving," *Advancing Philanthropy*, January/February 2008, 22.

<[http://www.afpnet.org/content\\_documents/ap\\_archives/20080102/20-25\\_afp.pdf](http://www.afpnet.org/content_documents/ap_archives/20080102/20-25_afp.pdf)>

<sup>29</sup> Lagasse, 23.

<sup>30</sup> Kristin Clarke, "Fundraising in a Recession," *The Center for Association Leadership*, March 2008. <<http://www.asaecenter.org/PublicationsResources/whitepaperdetail.cfm?ItemNumber=32286>>

fundraisers should refocus their attention on individuals. The fifth is to avoid cutting back on development staff. While it may save money in the short term, it will potentially lead to substantial financial loss in the long term. Most importantly, the article recommends that nonprofits stay calm and continue to use methods that are tried and true.

*The Chronicle of Philanthropy*, through interviews with leaders of many different nonprofit organizations, also recently published a list of ten effective methods for fundraising in a recession.<sup>31</sup> The first is to not treat giving as a financial transaction. Donors should be told how their giving is improving the community versus trying to lure them through the perks they will receive, such as their name on a program. The second is to keep close ties to donors and not let the only contact with them be solicitations. Organizations should focus on thanking and showing impact and then find ways to let donors see the impact for themselves. The third is to offer matching grants. This will show funders the organization is just as committed as they are to accomplishing objectives in community service. The fourth is to ask donors to give a small amount monthly, versus a large amount annually. This will enable organizations to keep constant contact throughout the year and may feel less financially overwhelming to the donor. The fifth is to look for ways to save money on fundraising. Organizations should attempt to trim special event expenses or eliminate programs that aren't serving them well. They should also look for ways to move their communications online. If times are really tight, they may even want to consider freezing staff salaries and renegotiating with their vendors and consultants. The sixth is to seek alternatives to soliciting private donations. These can range from renting space to another organization, starting a social enterprise,

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<sup>31</sup> Holly Hall, "Fundraising for Troubled Times," *The Chronicle of Philanthropy*, February 2009  
<<http://philanthropy.com/free/articles/v20/i08/08001301.htm>>

or developing a cause-marketing partnership with a corporation, and helps diversify funding. The seventh is to collaborate to raise money. Organizations can have greater impact and generate more attention by working with others, especially for special events. The eighth is to scale back ambitious campaigns while not giving up on them entirely. Capital campaigns generally should not be the number one priority during a recession, although they do not necessarily need to cease altogether. Instead organizations should focus on covering programming and operating expenses until they can resume their longer-term, more costly goals. Their ninth recommendation is to avoid emergency solicitations. Asking donors to bail an organization out or save them from going under is generally not an appealing message as no funder wants to invest in an organization on the brink of collapse. Instead, organizations should tell people how the economy is hurting the people they serve and the issues they work on. Their tenth and final recommendation is to shore up relations with grant makers. While it may take some time before endowment-based funders can get back to normal levels of giving, it does not mean nonprofits should let their established relationships with them disintegrate. Instead, they should be on their list when giving resumes, by being in touch and continuing to show them they are making a difference.

In an article published in September 2008 by Lawrence Kopp, a consultant for the TASC group, on the *Helping Hands: Nonprofit Knowhow* online blog, the author expounds on the importance of diversifying income sources to keep nonprofits above water during recessions.<sup>32</sup> He states that, during a recessionary period, instead of trying to raise more money, as is usually the case, nonprofits should strive to maintain at least the

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<sup>32</sup> Lawrence Kopp, "Tips for Nonprofits During a Recession or Economic Downturn," *Helping Hands: Nonprofit Knowhow*, September 26, 2008.  
<<http://www.nj.com/helpinghands/nonprofitknowhow/>>

previous years' funding, while simultaneously cut expenses. He also points out that many organizations make the mistake of relying on a single huge revenue source. Although large projected donations can be a wonderful thing, it is this type of donation that is at especially high risk of being cut during an economic crisis. He says it is best to prepare for the worse case scenario by making sure that one donor doesn't represent more than 10 percent of revenue, diversifying funds, and holding a six or seven-figure net reserve.

Kopp also warns that although large corporate sponsorships and donations garner lots of publicity, it's important to identify all types of financial support. He points out that large gifts make up just 1.3 percent of overall donations and thus, 98.7 percent of funding comes from donors who give smaller gifts. To encourage this type of giving, he advocates using direct mail campaigns and providing donors with the option to give through websites; as the convenience of donating online often makes people more inclined to give.

The consulting staff at the Fieldstone Alliance offers 20 ways for nonprofits to earn revenue should a financial emergency arise.<sup>33</sup> Most of these ideas can be used to raise money in 30 days or less. While they go so far as to suggest taking out loans from banks, I have outlined below only those I feel are most relevant to an organization with no immediate danger of closing. In terms of maximizing grant funds, the first suggestion is to get grants in the door earlier than the promised date. The example they provide is, in the first year of a three year grant, request that the grant be converted to a two year grant and allow the organization to draw 150% of the awarded annual grant in each of two years. They also suggest soliciting grants from discretionary funds managed by a

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<sup>33</sup> Alexis Cress and Tom Triplett, "20 Emergency Funding Sources for Nonprofits," *The Fieldstone Alliance*, December 2008.  
<[http://www.fieldstonealliance.org/client/tools\\_you\\_can\\_use/12-16-08\\_emergency\\_funding.cfm#20](http://www.fieldstonealliance.org/client/tools_you_can_use/12-16-08_emergency_funding.cfm#20)>

foundation's CEO, program officer, or corporate giving officer, as some foundations allow senior staff to make small grants without having to go through the usual full application process. The greatest chance for success using this method will be with an organization's current funders. A third suggestion is to ask a funder who has awarded a larger grant to allow a release of restrictions during the crisis. For instance, if a grant is intended for a specific program, it could potentially be rerouted to support operating expenses, such as staff salaries, until the crisis is no longer imminent.

In terms of cutting expenses and raising revenues, the first suggestion is to speed the inflow of accounts receivable by invoicing promptly, offering incentives to pay early, and charging interest for late payments. A second suggestion is to increase the prices of products or services although there are some questions to consider before doing this such as: is the organization covering all of its costs in the existing pricing structure, can the market it serves afford to pay higher prices, and will a new pricing model put them out-of-step with their competition? In this same vein, another option they suggest is to analyze the possibility of selling what you are now providing for free. This can most likely be done by searching for new markets for existing products. The example they provide for this is an organization that has a grant to provide free services to clients in its home county could sell that same service to clients in an adjoining county. A final suggestion they make is to sell valuable information an organization possesses that others need, or to sell the "back room" services that an organization already provides for their own benefit to others, such as accounting help, or office space.

The Chronicle of Philanthropy also recently published the transcription of a live discussion it held in February 2009 on how to plan special events during a recession. The

two panelists invited were Ami Cervin, events planner for the Greater Twin Cities United Way in Minneapolis and Jim Leighton, director of events and programs for the Children's Cancer Research Fund in Minneapolis. Jim Leighton, when asked how special events should change during a recession, states he thinks it is important to be realistic with stakeholders on fundraising goals and manage their expectation accordingly.<sup>34</sup> He brings up an important point about the perception equation when he states,

We need to be sensitive to the fact that in a down economy lavish events may be seen as inappropriate. I expect that the patrons of the event will understand that the event is not as extravagant as in the year's past. I would however strive to make sure the patrons have as good of an experience as past events. An event does not have to be expensive to provide a good experience.

He also warns against lowering admission costs to special events to make it more affordable for patrons to attend, stating that an organization should never want “to be in a position of devaluing an event they have worked so hard to make valuable.”<sup>35</sup>

When Amy Cervin was asked a question about whether she recommends scaling back more lavish special events, she responds by saying she thinks that is currently a wise choice for organizations to make.<sup>36</sup> She recounts that the annual board dinner her organization holds was recently moved from a country club to a food bank and met with very positive response from all involved. She states, “in this economy we have found that folks really want information about what's going on, what the organization is doing and how they can help.”<sup>37</sup> She also recommends the use of social media to communicate to the public an organization's current efforts.

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<sup>34</sup> Live Discussion: “Planning Special Events During a Recession,” The Chronicle of Philanthropy, Tuesday, February 3, 2009, 12:00pm.

<[http://philanthropy.com/live/2009/02/special\\_events/](http://philanthropy.com/live/2009/02/special_events/)>

<sup>35</sup> Ibid.

<sup>36</sup> Ibid.

<sup>37</sup> Ibid.

In a recent article published by the Learning Center's *Network for Good*, nonprofit consultant Marc Pitman details three major mistakes organizations make in fundraising during times of financial crisis.<sup>38</sup> The first is to spend less on fundraising. He argues that most fundraising efforts should be tweaked to improve their effectiveness and lower their cost, rather than cut out completely. In a recent study he conducted, he discovered organizations' direct mail programs raised more money during the years they sent out more letters. He explains that less investment can result in less being raised which leads to further cuts and even less raised, thus creating a vicious cycle. The second mistake he points out that nonprofits make is to become pessimistic. He states development professionals should strive to invite people to invest in their organization's mission and impress that their cause makes the world a better place regardless of the economy. If the dire times turn them negative, donors will begin to share in their negativity and view their giving as futile. The final mistake Pitman has often witnessed in nonprofits is to apologize before asking for donations. He states, "Timidity is a sure-fire way to not raise money."<sup>39</sup> While it is important to understand that many donors may not be able to give at the same level, a relaxed understanding of people's financial realities can make them even stronger proponents of an organization in the future. He concludes by stating that the best way to recession-proof fundraising is to keep doing what has worked in the past and to do it in a way that strengthens relationships with donors, helping them become further proponents of an organization's particular cause.

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<sup>38</sup> Marc Pitman, "Recession-proof Fundraising," *Network for Good*, October 21, 2009.  
<<http://www.fundraising123.org/article/recession-proof-fundraising>>

<sup>39</sup> *Ibid.*



## **Recommendations**

When examining this research, it is clear that the New Orleans Ballet Association is potentially poised to weather the recession. They have a large cash reserve that they established for the purpose of economic crisis. Their funding is well-diversified among individuals, corporations, foundations, and earned revenue. They have ongoing partnerships with many organizations in the city so that resources are shared and utilized efficiently. And they have learned to budget expenses so well that they are typically able to create a surplus at the end of the year. While this may no longer be the case for the next several years, it is at least unlikely they will fall into the red.

However there are a few things NOBA may want to consider changing or improving should New Orleans fall deeper into the recession. For instance, currently there is only one person on staff is devoted entirely to development and that person focuses most of her time on special events. Furthermore, this development associate was not reinstated from the time Katrina hit until August 2008. Perhaps if NOBA had made this position one of their first staffing priorities after the storm, they would be in an even more solid financial position today. And if they were to currently increase the development staff, even by just one extra person, it is likely, according to the research above, they would eventually see funding increases.

NOBA may also want to heed the advice of several of the consultants above and begin stating a case for why funding is more dire now than in years past. While it was important for them to spotlight the city's rebuilding process in the funding requests of the years since Katrina, the time may have come to highlight the country's more recent economic crisis in their national requests and proposals. This may help to make their

request more relevant and immediate to those national funders who are not familiar with the city's hardships, but are very well-acquainted with those affecting the country as a whole.

NOBA also may want to consider scaling back their special events. While the annual gala continues to be successful in raising money for the organization, the expense of the event could easily be down-sized in several ways. For instance, NOBA typically pays for the rental of the venue of one of the city's more luxurious spaces: 2009 was held in the entryway of the New Orleans Museum of Art (\$8,000 rental fee) and 2008 was held at the posh downtown nightclub, the Republic (\$6,000). In a city like New Orleans, where old warehouses, art galleries, and parks abound, NOBA could potentially downsize the cost of the venue without compromising a stylish atmosphere. Also, while NOBA is generally able to secure the food in-kind for both the gala and the benefactor party that precedes it each year, they spare no expense in printing the invitations to each event. This year they were ordered through one of the city's most expensive paper companies: Scriptura [see Appendix K]. This too, for a minor decrease in quality, could potentially substantially lessen cost, or maybe even be secured in-kind.

If the city's economy, which currently appears to be less affected by the recession than the rest of the country, takes a dramatic nosedive in the next two years, NOBA may need to consider some of the more radical ideas mentioned above. If worse comes to worse, the organization has many sellable services. For instance, the after-school dance classes which are currently offered free of charge in three parishes. These classes could continue to be free in Orleans, the organization's primary demographic, but begin charging a fee by semester in Jefferson and St. Bernard. They could easily charge more

than the current ten dollar entrance fee for the master dance classes they hold with world-renowned dance companies. Each year NOBA conducts its artist residency program in the three elementary schools it works with, their presence in the schools becomes more valued by administration and parents. Additionally, each school becomes more financially stable. Should NOBA begin suffering from a decrease in charitable giving, they could easily begin asking each school to shoulder a greater portion of the cost of the program. NOBA has also been recognized nationally for its education evaluation tools and organizational administration. As such, it is the organization's current goal to electronically publish their methods and make them free to the public on their website. However if times become tight, they may want to consider publishing them for sale on their website or an outside online vendor. While these revenue-generating methods may not be as in tune with their mission as their current supply of services (90% of which are free), they could help the organization come out unscathed from financially dire times.

One similar organization NOBA may want to look to for guidance in best practices in fundraising is the non-profit dance presenter, Dance St. Louis, located in St. Louis, Missouri. Begun in 1966 by a small group of dance enthusiasts, Dance St. Louis has grown into one of the nation's largest presenters of dance. Their mission is "to provide the St. Louis region with the world's best dance and to develop an appreciation of dance as an art form."<sup>40</sup> Much like NOBA, they fulfill this mission through presenting an annual season of dance companies (from modern to ballet to ballroom) and conducting educational outreach activities in the city of St. Louis (in-school residencies and

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<sup>40</sup> "Mission and History," *Dance St. Louis*, 4/23/09  
<[http://www.dancestlouis.org/about\\_mission.htm](http://www.dancestlouis.org/about_mission.htm)>

workshops, young people's concerts, community master classes, and pre-performance talks).

Dance St. Louis has presented many of the same companies NOBA has such as Alvin Ailey American Dance Theater, the American Ballet Theater, and the Paul Taylor Dance Company. However, they have also been able to present companies of even larger international acclaim such as Stomp, Riverdance, the Bolshoi Ballet, and the Paris Opera Ballet. Also, while NOBA typically presents between four and six companies a season, Dance St. Louis presents anywhere between eight and twelve. It is clear that Dance St. Louis has a larger annual operating budget than NOBA. One reason for this could be an innovative development strategy they currently employ. This is to devote an entire section of their website to the various ways the public can donate to the organization. They have individual web pages devoted to their annual campaign, tribute gifts, planned giving, matching gifts, corporate support, and how to donate online; each one explaining how to donate and what donations will be used for. They even go so far as to point out that ticket sales generate less than half the revenue needed to sustain the organization, and they therefore must rely on public donations to make up the difference.<sup>41</sup>

The spotlight on giving Dance St. Louis places on its website falls in line with two of the best practices mentioned above. These are to 1) utilize the internet to solicit donations to take advantage of its broad reach and its ease, and 2) make a clear case for why giving is important. I think adding a similar section to NOBA's own website, once its redesign begins, would be very beneficial to the organization in helping it solicit a greater number of donations as well as reaching new potential donors.

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<sup>41</sup> "Annual Giving: Why Should I Give?," *Dance St. Louis*, 4/24/09  
<[http://www.dancestlouis.org/support\\_annual.htm](http://www.dancestlouis.org/support_annual.htm)>

## **CHAPTER FIVE**

### **INTERN'S CONTRIBUTIONS**

#### **Short-term Contributions**

Throughout the course of the internship, I assisted in the creation of over 30 grants, and about 5 interim and final reports to current funders. I also conducted a substantial amount of research on new grant opportunities such as the Americorps program and national foundations that have a history of donating to dance. Finally, I assisted with the creation of a timeline documenting deadlines, application procedures, and key contact people for all current grants NOBA applies to. Thus, during my activities at NOBA, I believe I had a heavy-hand in procuring much of the funds NOBA will potentially receive from the Spring grant cycle. I also helped identify new sources for public and private funding that the organization will be able to utilize in years to come. I was able to streamline some of the application process through my construction of the grant timeline and my commitment to improving the organization of development files. I accomplished this in small ways: re-organizing already existing development folders in the hard drive, creating useful supplemental material for one grant that could be utilized for future ones such as current staff bios or Board of Director lists, or simply delivering the hard copies of recently-submitted grants to the appropriate folder. However I believe it was the many small efforts I made throughout my internship that contributed to the improved general efficiency of the department. Finally, through the many hours I spent writing and editing grants as well as putting together complete grant packages, I am confident that I freed up much of the Education Director, Suzanne Hirsch's time. She was

therefore able to instead devote greater focus to the management of educational programming.

### **Long-term Contributions**

I am confident that my previous grant-writing experience I gained through the Development class in my Arts Administration program played a key part in helping me become a valuable resource to NOBA throughout the Spring. In the long run, I believe my presence at NOBA was important to helping the Executive and Education Directors recognize the importance of having one person primarily devoted to the writing of grants on staff. As mentioned before, this source of income accounts for a large portion of the organization's annual budget and therefore requires a substantial amount of time each week to plan for, complete, and submit the many different grant applications. I heard many times throughout the course of my internship how relieved Ms. Hirsch and Ms. Hamilton were that they were actually ahead of schedule in the grant cycle for instead of running up against deadlines as was usually the case. I believe it really brought to the surface that the organization is currently short-staffed in comparison to their scope and depth of programming and thus each staff member is at full capacity in their day-to-day responsibilities. As the organization moves ahead, I believe it is crucial for them to hire at least several new staff people so that they can not only maintain the current quality of programming but further improve and expand it as well. It is clear through community feedback and demand, recognition from funders, and the stream of invitations to national stages and events that the services they provide are much-needed and effectively carried out. I think this is especially true of their education programming, which at the moment, is managed by someone who must also spend much of her time submitting grants.

## CONCLUSION

The time I spent at the New Orleans Ballet Association taught me a great deal. I definitely honed not only my grant-writing skills, but my writing ability in general. I learned what funders are most interested in knowing about a nonprofit organization and how to effectively and clearly present a case for funding. I learned a great deal about new developments in the art of dance, as well as the current state of the dance world in general. I was given an intimate glimpse into a how a non-profit arts presenter is managed, funded, and marketed; how its future is mapped; and most importantly, how it successfully connects with and serves its surrounding community. Finally, I was afforded the opportunity to witness how an organization must adjust to a continuously changing and often unstable environment, thanks to the current national economic recession and the long, slow recovery process necessary after a major disaster like Hurricane Katrina.

While the time I spent at NOBA exposed some of the organization's shortcomings to me, it also instilled in me a deep respect for both the quality of the organization's programming and the commitment and dedication of its staff. I heard first hand the accounts of several thankful parents whose children took part in NOBA's free after-school dance classes, and the excitement and appreciation expressed by audience members after exiting the theater from one of the Spring's three performances I attended. I also witnessed constant planning and coordination, occasional 60 hour work weeks, and a great deal of team work on the part of NOBA's administration. The New Orleans Ballet Association, while experiencing the occasional organizational restructuring or natural disaster, has persisted for almost four decades in a city where many other non-profits have not. If the organization continues this pattern of success and perseverance, it is

likely it will also continue to enjoy an even greater potential for audience building, community connection, and organizational growth as the city continues its recovery.



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## Appendix A

# PRESENTING THE 2008-2009 SEASON OF DANCE



TOP PHOTO BY JONAS LUNDQVIST,  
BOTTOM LEFT PHOTO BY PAM FRENCH



## BALLET HISPANICO

FRIDAY, OCT. 24 AND SATURDAY, OCT. 25  
DIXON HALL, TULANE UNIVERSITY

"...hands down the leading Hispanic-American dance company...and to miss one of their performances is to miss a great treasure in the dance world." *Buenos Aires Herald*

## TREY MCINTYRE PROJECT

FRIDAY, NOV. 21 AND SATURDAY, NOV. 22  
DIXON HALL, TULANE UNIVERSITY

"McIntyre's facility with fear-factor ballet moves, and his gift for mating them with pop music, has propelled him to the forefront of American ballet choreographers." *The Washington Post*

## MAHALIA JACKSON THEATRE OF THE PERFORMING ARTS RE-OPENING GALA

SATURDAY, JAN. 10  
IN COLLABORATION WITH THE LOUISIANA

PHILHARMONIC ORCHESTRA

FEATURING ITZHAK PERLMAN AND DANCERS OF SAN FRANCISCO BALLET AND NEW YORK CITY BALLET

## CEDAR LAKE CONTEMPORARY BALLET

FRIDAY, JAN. 30 AND SATURDAY, JAN. 31  
PIEDRA LUPIN MEMORIAL HALL, NOCCA

CO-PRESENTED WITH THE NOCCA INSTITUTE

"These Cedar Lake dancers are, without exception, extraordinarily gifted...the strong, cohesive dancing in these carefully contrasted vignettes won me over." *The New York Times*

## HOUSTON BALLET

### MARIE

WITH THE LOUISIANA  
PHILHARMONIC ORCHESTRA

FRIDAY, MARCH 27 AND SATURDAY, MARCH 28  
MAHALIA JACKSON THEATRE OF THE PERFORMING ARTS

"One of the nation's best ballet companies..." *The New York Times*

## DIABOLO

SATURDAY, MAY 9

MAHALIA JACKSON THEATRE OF THE PERFORMING ARTS

"...straight-forward playfulness with props and physicality that elicit cheers from the audience." *The New York Times*

NEW ORLEANS BALLET ASSOCIATION

# CEDAR LAKE CONTEMPORARY BALLET

*Benoit-Swan Pouffer, Artistic Director*

JANUARY 30 & 31, 2009, 8 P.M.

FREDA LUPIN MEMORIAL HALL, NOCCA

CO-PRESENTED WITH THE NOCCA INSTITUTE

*"These Cedar Lake dancers are, without exception, extraordinarily gifted...the strong, cohesive dancing in these carefully contrasted vignettes won me over." – New York Post*

Founded in 2003 by Nancy Laurie, Cedar Lake Contemporary Ballet has distinguished itself through both its exceptionally talented corp of sixteen dancers and its concurrent emphasis on acquiring and commissioning new works by the world's most sought-after choreographers. Under the artistic direction of Benoit-Swan Pouffer, Cedar Lake offers a wide-ranging spectrum of both American and international repertory, including works by Nicolo Fontle, Edward Liang, Crystal Pite, Jacopo Godani, Stijn Celis, Angelin Preljocaj and Ohad Naharin. Through their daring, athletic movement and integration of ballet into contemporary and popular forms, the dancers of Cedar Lake take audiences on a choreographic journey, which explores the infinite possibilities of movement and multimedia. Works for 2008-2009 include world premieres by Luca Veggetti, Jill Johnson, Didi Veldman and Sidi Larbi Cherkaoui.

Paris-born Pouffer's path was irrevocably decided at the age of six, upon entering the Conservatoire de Bobigny. There he studied dance until the age of 14, when he received a scholarship to the prestigious Conservatoire National Supérieur de Musique et de Danse in Paris, where he performed works by such renowned French choreographers as Claude Brumachon, Daniel Lortie and Angelin Preljocaj. Studying Cunningham technique and improvisation as well as ballet, he realized that mixing various forms of dance could breathe new life into the art form.

While at the Conservatoire National Supérieur, Pouffer began choreographing, teaching workshops and developing his personal style. Here he was also introduced to the work of Alvin Ailey: "I knew that I had to dance with his company." And it was not long after that he got his chance. In April 1993, Pouffer took first place in the Benetton European Dance Competition and won a scholarship to the Alvin Ailey American Dance Center. In a matter of months, he had moved to New York and had begun taking classes with the company. After a year at the Ailey school, Pouffer performed with such companies as Philadanco, Donald Byrd/The Group, and Complexions.

In 1997, he became a member of the Alvin Ailey American Dance Theater, where he danced from 1997 to 2004 under the direction of Judith Jamison. He performed works by Talley Beatty, Redha Bentefour, Ronald K. Brown, Ulysses Dove, George Faison, Geoffrey Holder, Bill T. Jones, Alonzo King, Donald McKayle, Hans van Manen, Elisa Monte and, of course, Alvin Ailey. Pouffer taught outreach programs in South Africa and master classes throughout Europe and the United States before becoming the Artistic Director of Cedar Lake in 2005.

NEW ORLEANS BALLET ASSOCIATION

PHOTO BY STEVEN BAULIE



PHOTO BY FRANÇOIS ROUSSEAU



# HOUSTON BALLET

*Stanton Welch, Artistic Director*

MARCH 27 & 28, 2009, 8 P.M.  
MAHALIA JACKSON THEATRE FOR  
THE PERFORMING ARTS

In 1955, the founding members of Houston Ballet Foundation had a vision for dance in Houston: to create a resident ballet company and to start a school which would train its dancers. Houston Ballet Academy was established that same year under the leadership of Titianna Semenova, a former dancer with the Ballet Russe de Monte Carlo. In 1969, the professional company was founded under the direction of Nina Popova, a former dancer with the Ballet Russe de Monte Carlo and American Ballet Theatre. Houston Ballet Foundation has seen the fulfillment of its goals: an internationally acclaimed ballet company which is now America's fifth largest and an academy that trains dancers for both Houston Ballet and other companies around the world. The company comprises 54 dancers, including artists who have won gold and silver medals at major international ballet competitions. In July 2003, the acclaimed Australian choreographer Stanton Welch assumed the leadership of Houston Ballet as artistic director. Mr. Welch, who has created ballets for many of the world's leading companies, has choreographed eleven works for Houston Ballet.

From 1976 to 2003, Englishman Ben Stevenson, O.B.E., a former dancer with Britain's Royal Ballet and English National Ballet, served as artistic director of Houston Ballet. He established a core of permanent choreographers whose works have greatly enriched the company's repertory. In 1989, Sir Kenneth MacMillan joined the company as artistic associate and Christopher Bruce was named resident choreographer. In March 1995, Trey McIntyre, one of the most talented young dance makers in the country, assumed the position of choreographic associate.

In 1984, a newly renovated dance facility was inaugurated to further the excellence of balletic training and to accommodate the growth of the company and its academy. In 1987, the company moved into its new performance space, the magnificent Wortham Theater Center, a state-of-the-art facility in which the company currently performs over 75 performances seven months a year. Throughout its extraordinary growth period, Houston Ballet's operating expenses have grown from less than \$1 million in 1975 to over \$17 million today. In May 1987, the company launched an ambitious endowment drive. Houston Ballet's endowment stands at over \$59 million, as of May 2008, making it one of the largest endowments of any dance company in the United States.

The company has toured extensively to critical praise in Europe, the United Kingdom, the Orient, Canada, and in cities throughout the United States. In July 1995, Houston Ballet was the first full American ballet company invited by the Chinese government to tour the People's Republic of China. An estimated 500 million people witnessed Houston Ballet's production of *Romeo and Juliet* when the company's opening night performance was telecast live on Chinese television. Over the last ten years, the company has emerged as one of the most effective international ambassadors for the city of Houston, performing in London, New York, Hong Kong, Los Angeles, Toronto, Montreal, The Kennedy Center in Washington, D.C. and at the Bolshoi Theater in Moscow.



PHOTO BY RIA FRANCES

NEW ORLEANS BALLET ASSOCIATION



THE PERFORMING ARTS OF NEW ORLEANS

# DIAVOLO

Jacques Heim, Artistic Director

NEW ORLEANS BALLET ASSOCIATION

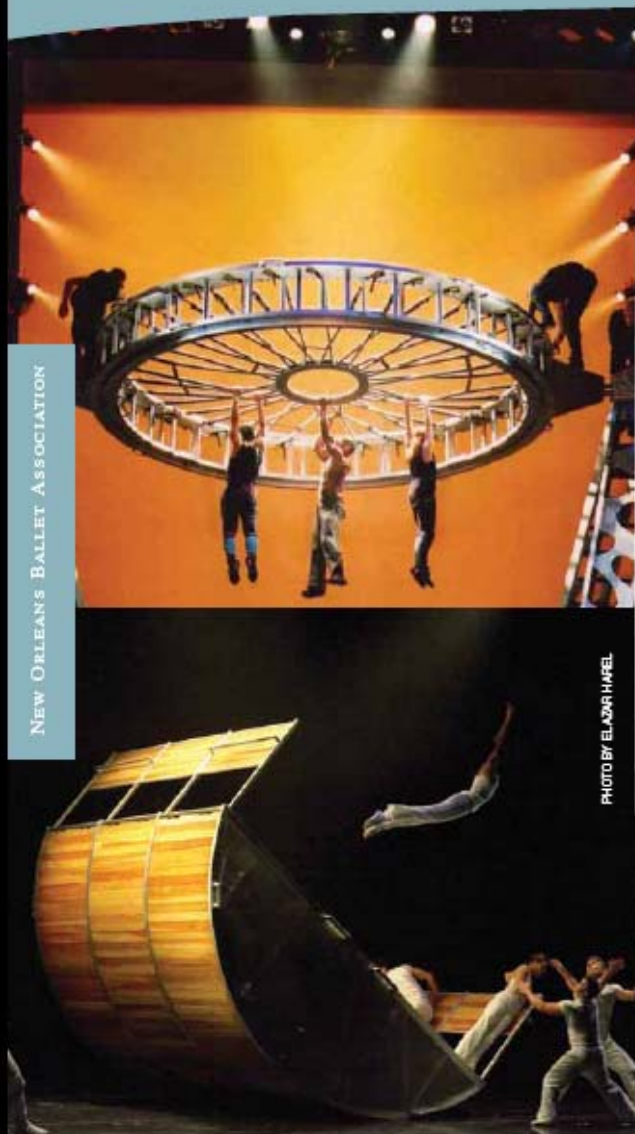


PHOTO BY ELAZAR HAFEL

MAY 9, 2009, 8 P.M.

MAHALIA JACKSON THEATRE FOR  
THE PERFORMING ARTS

*Diavolo redefines dance through dynamic movement, enlightening communities through trust, teamwork, and individual expression.*

Diavolo company members are dancers, gymnasts, actors, athletes...and always teammates. Under the guidance of Artistic Director Jacques Heim, they collaboratively develop work on oversized surrealistic sets and structures. Everyday items...doors, chairs, stairways, provide the backdrop for dramatic movement—leaping, flying, twirling—to create metaphors for the challenge of relationships, the absurdities of life and the struggle to maintain our humanity in the shadow of a technological world.

Diavolo was founded in 1992, in Los Angeles, by Artistic Director Jacques Heim. In 1993, the company was nominated for two Lester Horton awards in Los Angeles, and in 1995, Diavolo made its European debut at the Edinburgh Fringe Festival where they were named "Best of the Fest" by the *London Independent* and "Critic's Choice" by *The Guardian*. Also in 1995, the company received three Lester Horton awards for the work *Tête en L'Air*. Since then, the company has been nominated several times for numerous awards, and they were honored to perform live at the 10th annual American Choreography Awards in 2004.

Due to the unusual and innovative way that Diavolo works with architectural structures, the creative team at *Cirque du Soleil* was inspired to hire Jacques Heim to choreograph a permanent show in Las Vegas, entitled *Ka*, which opened in February of 2005. In 2007, The Los Angeles Philharmonic asked Diavolo to create a performance to music director Esa-Pekka Salonen's *Foreign Bodies*. The *Los Angeles Times* declared its premiere at The Hollywood Bowl "one of those rare events that define the art of this city when the levels of vision and support are equally exceptional." In addition, Diavolo has performed internationally in Scotland, Japan, Chile, Mexico, Brazil, Canada, Italy and South Korea.

## Appendix B

## Acknowledgments

The New Orleans Ballet Association and the NORD/NOBA Center For Dance are sponsored in part by:  
 BRAVO, Chalmette Refining, LLC, CGG Americas, Entergy, Friends of NORD, Greater New Orleans After School Collaborative, The Keller Family Foundation, The Lupin Foundation, Mary Freeman Wisdom Foundation, Regions Bank, The Rosamary Foundation, The Patrick F. Taylor Foundation, United Way, The Wallace Foundation and Edward Wisner Donation. The program is supported in part by a grant from the National Endowment for the Arts in partnership with the Southern Arts Federation and the Louisiana Division of the Arts; an award from the National Endowment for the Arts, which believes that a great nation deserves great art; a Decentralized Arts Grant from the Louisiana Division of the Arts, Office of Cultural Development, Department of Culture, Recreation and Tourism, in cooperation with the Louisiana State Arts Council as administered by the Arts Council of New Orleans.

EDWARD WISNER  
DONATION



CITY OF NEW ORLEANS



Surdna Foundation



The Wallace Foundation  
 Inspiring greatness.  
 Opening solutions.  
 Expanding opportunities.

NATIONAL  
ENDOWMENT  
FOR THE ARTS  
 A great nation  
deserves great art.



NEW ORLEANS  
JAZZ & HERITAGE  
FESTIVAL AND  
FOUNDATION, INC.  
CITY OF NEW ORLEANS



MARY FREEMAN WISDOM FOUNDATION

Keller Family Foundation

THE  
LUPIN  
FOUNDATION

The PeyBack Foundation



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Southern  
arts  
FEDERATION  
Established 1973



LOUISIANA  
ENDOWMENT  
FOR THE  
HUMANITIES



**NOBA**  
*Bringing Dance to Life*

## Education Programs



2008

## Calendar Year Statistical Snapshot and Reflection

## Final Report

"Thank God for the donors that contribute to these programs,"  
 NORD/NOBA Center  
 For Dance parent





### Statistical Snapshot

609 served through after-school sequential training  
 390 served through arts in education classes  
 775 served through on-site school guest workshops  
 1134 served through school theatre experiences  
 342 served through family field trips  
 3113 served through community performances  
 752 served through community activities  
 72 served through classroom teacher workshops  
 82 served through senior programs  
**7,269 total served through education in 2008**

#### 4 in-school sites

Lake Forest Elementary; Phoebe Hearst Elementary;  
 Mary Bethune Elementary; Andrew Jackson  
 Elementary

#### 11 after-school sites

Tulane University; Annunciation NORD Center;  
 Behrman NORD Center; Cut Off NORD Center; St.  
 Bernard NORD Center; St. Benilde Church and School;  
 St. Jerome Church; Holy Name of Mary School;  
 Eisenhower Elementary; Andrew Jackson Elementary

#### 20 artists employed by in- & after-school programs.

3 Full-time; 2 Part-time; 15 Contract

#### Guest Companies/Artists in Residence

Aspen Santa Fe Ballet, Alfred Dove, Dayton  
 Contemporary Dance Company, Ballet Hispanico, Trey  
 McIntyre Project



*"In addition to the quality training, my daughter has increased her confidence due to her teachers' praise and the confidence they have in her. If she truly wants to dance professionally, NORD/NOBA is the place for her,"*  
 says a 2-year parent.

*"Your program allows children regardless of their ethnicity to strive in the dance world,"* says a 5-year parent.

### A Reflection

In 2008, NOBA continued its 16 year tradition of offering accessible dance training to the community of the Greater New Orleans Area. Programs offered youth, families and adults classes at 11 locations throughout the year. The year brought national attention to the programs, implemented new programs to serve the needs of the community, and served 7,000+ people.

#### National Exposure and Accomplishments

The NORD/NOBA Center For Dance represented New Orleans in a performance at the Kennedy Center on the Millennium Stage, June 19, 2008. The program commissioned four new works that were premiered in the Summer Concert Series by local and guest artists including a work by Alfred Dove, *In the Spirit of U* (2nd section included excerpt of Ulysses Dove's *Vespers*).

The Royal Academy Dance Gazette magazine featured the NOBA programs as part of an article about post-Katrina dance in New Orleans.

Honors/Awards: Big Easy Award nomination for best Modern dance for the NORD/NOBA Center For Dance; Selection as one of nine sites to participate in the Creative Aging Program of the National Guild of Community Schools of the Arts; NOBA's Education Director served as a committee member for the LA Department of Education Dance Curriculum Committee.



#### Expanding Programs

In January 2008, NOBA expanded its partnership with the NORD/NOBA Center For Dance to offer programs for senior citizens at two locations. The program is 50 weeks a year and provides more than 80 seniors with fitness and dance classes.

The NORD/NOBA Center For Dance expanded its pre-professional program by adding a level 4 & 5 class and a pre-pointe training program for students.

The sequential dance training provided to the youth at all the locations over the year has built an understanding, vocabulary, and technical skill in dance forms, which demonstrates youth strengthening their artistic skills. Participants are learning discipline, self-reflection, problem-solving skills, focus, social skills, self-respect, teamwork, respect of others, all while in a physical activity, which is missing in their lives at school. Semi-annual student evaluation of the students by the artists, self-evaluation by the students, and performance in class/events demonstrated growth indicators and success. After-school programs created safe havens for youth through weekly contact with positive role models/instructors in a structured environment. Retention rates are 70-80% and daily attendance averages are 65%, which are reflective of the program's success.

## Appendix C

### Key Personnel

**Jenny Hamilton, Executive Director** (MA in Arts Administration and MBA from UNO) - Since her appointment as Executive Director of the New Orleans Ballet Association (NOBA), Jenny Hamilton has forged new benchmarks for the organization. Cooperative management strategies have resulted in fiscal and programmatic growth. The resulting net gain has been a marked increase in programs/services. In addition, the Artistic Excellence Fund (a cash reserve fund) has been established (2000), to encourage the commissioning of new works, and to “raise the bar” to a new artistic level. Prior to her engagement as Marketing Director for NOBA, Ms. Hamilton worked with the New Orleans Opera Association and the Arts Council of New Orleans. As Director of Marketing she was responsible for increasing subscriptions by 130%, single tickets by 165% and earned revenue by 135% between the 1993/94 and 1997/98 seasons. Ms. Hamilton received her Master in Arts Administration from the University of New Orleans in 1992 and later her MBA in 1995. Professional Affiliations include: Dance/USA, Arts Partners, Americans for the Arts, Louisiana Alliance for Dance, and LA Partnership for the Arts.

**Laura Burkhart** (Marketing Consultant) is an independent dance consultant working with dance production, presentation and marketing. She worked at Dance St. Louis from 1987- 2006. In her 19-year career with Dance St. Louis, she served as operations manager, director of marketing, operations and education, general manager, and was also interim executive director in June-August 1993 and March-May 1995. Before joining Dance St. Louis, Burkhart managed subscription and development campaigns for the Saint Louis Symphony Orchestra. She is a current member of Dance/USA's Board of Trustees and Presenters Council and has been a member of the Association of Performing Arts Presenters for 17 years. She is a founding board member of the Missouri Dance Education Organization and served a three-year term on the Missouri Arts Council Dance Program Advisory Panel. From 1988-1998, she was a member of Burning Feet Contemporary Dance Company. Burkhart is a graduate of the University of Missouri's School of Journalism.

**Sandra Fank, Director of Finance and Operations** has twenty years of experience as finance director with the New Orleans Ballet Association. She has been working in accounting, human resources and office management for more than 40 years with for-profit and non-profit agencies. She holds an Associates Degree from St. Bernard Community College.

**Wanda W. Fulton, Box Office Manager** was promoted to Box Office Manager in August of 1994 after serving as the New Orleans Ballet Association's Administrative Assistant since October 1991. Prior to coming to NOBA Ms. Fulton was employed by Hibernia National Bank as a Proof Operator, she worked in this position for only three months before being promoted to Secretary to the Department Manager. Ms. Fulton has over 18 years of clerical and customer service experience.

**Suzanne Stack Hirsch, Education Director** (MA in Arts Administration from UNO and BFA in Dance from the University of Southern Mississippi) - Prior to returning to NOBA in the fall of 2003, she was the Development Officer for the College of Arts at the University of Southern MS and the NOBA Education Residency Manager. She has worked as an artist and/or administrator for the New Orleans Dance Collective, New Orleans Dance Festival, National Dance Institute, Country Day Creative Arts Camp. She has been a guest artist/choreographer for IZZY Moving, East Central Community College, and the University of Southern Mississippi. Professional Affiliations include: National Dance Education Organization, Louisiana Association for Health, Physical Education, Recreation and Dance, Mississippi Alliance for Arts in Education, and USM American Humanics. She is serving as a Peer Advisor for the National Guild of Community Schools for the Arts and on the Dance Curriculum Committee for the Louisiana Department of Education.

**Jessica Brown** (Communications Manager, full-time employee) has been with NOBA since her move back to the New Orleans Area in August 2008. Prior to this move, Ms. Brown worked as a Senior Director of Partner Relations for White Tie, INC in Seattle, WA where she spearheaded business development and market initiatives. Ms. Brown graduated with a M.A. in communications from Loyola University New Orleans in 2004 and received her B.A. in Print Journalism from Troy University in AL.

**Caitlin Williams** (Development Associate Individual Giving & Special Events, full-time employee) has been with NOBA since August 2008. Ms. Williams is a recent graduate from Tulane University where she earned her B.A. in Political Science and Art History. Prior to joining NOBA, Ms. Williams interned and worked for the Ashe Cultural Arts Center.

#### *Consultants*

Susan Koff, Ed.D. (Art Education Consultant) **earned a Doctorate of Education at Temple University (Philadelphia, PA). Her area of concentration is dance education. She holds a Masters of Arts Degree from Columbia University (New York, NY) and a Bachelor of Fine Arts Degree from the University of Arizona (Tucson, AZ). She has an extensive background as a consultant, including program planning services, presentations and scholarly papers. Ms. Koff has worked with such organizations/programs as: National Dance Education Organization (Minneapolis, MN) in April 2001; Dance and the Child International (Regina, Saskatchewan, Canada) in August 2000; and Columbia University, School for International Public Affairs (New York, NY) in December 1999. She currently is providing site visits and program consultations for the extensive roster of in-school arts education programs of the New Orleans Ballet Association and the NORD/NOBA Center For Dance. She is currently a visiting arts education professor at New York University.**

#### *Artists (core faculty)*

**Sarah Jane Duax (CFD Faculty)** is currently an adjunct faculty member of the Newcomb Dance Program and is an instructor with. Sarah holds an MFA in dance from the University of Iowa. She has performed professionally with Buffalo Ballet Theater, Pennsylvania Ballet, New Orleans Dance, Hysell Ballet, Confederacy of Dances, and New Orleans Dance Collective. Sarah has choreographed and taught for Renverse Ballet, Garden District Ballet, New Orleans Dance Academy, NORD/NOBA Center For Dance, and NOCCA/Riverfront, among others.

**Aline de Souza (Full-Time Local Artist)** is a native of Brazil with a degree in Physical Education at Universidade Castelo Branco. She also graduated from Escola Estadual de Danças Maria Olenewa of the Municipal Theatre of Rio de Janeiro. She has studied in New York at STEPS, Broadway Dance Center, Alvin Ailey Dance Center, and in Boston at Boston Ballet. She performed with the Ringling Brothers and Barnum & Bailey Circus for four years. She has performed internationally for the Circus and with international festivals as a professional dancer. She has been a dance educator for urban youth programs in Brazil and began working with NOBA in Fall 2007.

**Meredith R. Early, (Full-Time Local Artist)** dancer/performer and choreographer, holds a BFA in performance and choreography from The University of Southern Mississippi and an MFA in dance from Sarah Lawrence College. Trained in classical ballet and modern/post modern dance, Meredith has been a student at The Alvin Ailey School, Broadway Theatre Project and The School at Jacob's Pillow. She had created traditional and experimental multidisciplinary contemporary works presented in New Orleans, Mississippi, and New York. Meredith has been a teaching artist for the New Orleans Ballet Association, Contemporary Art Center, Orleans Parish School Board, as well as on the university level.

**Cecile Gibson (CFD Faculty)** graduated with from the Nice Music Conservatory with an artist Sorbonne University – Paris, France in modern languages. In Paris, she trained with Lyubov Egorova, Olga Preobrajenska, and Mme. Rousanne. She was principal dancer with Roland Petit's Ballets de Paris. She danced in the 1960 film Black Tights. Cecile danced in musicals with

Josephine Baker, Marlene Dietrick, and Gilbert Beaud, to name a few. Cecile has danced with Margot Fonteyn, Maurice Chevalier, Moira Shearer, Hans von Manen, and Cid Charisse, and for Princess Margaret of England, King Boudouin of Belgium, and President Charles de Gaulle of France. She was the director of the preparatory dance department at the University of Louisville School of Music. She created the University of Louisville Dance Academy, the official school of the Louisville Ballet.

**Maritza Mercado-Narcisse (CFD Faculty)** is a graduate of the New Orleans Center for the Creative Arts and Loyola University. She was selected in March 2006 for an artist residency with Jacob's Pillow and the 2007 Louisiana Artist Fellowship. She has performed with the New Orleans Ballet Ensemble, Tsunami Dance Company, ArtSpot Productions, and many others. She studied on scholarship at the 1994 Alvin Ailey American Dance Theater Summer Intensive and the Steps Studio on Broadway. She has studied with Milton Myers, Willie Burrman and Ron Brown. She has produced many choreographic works and produced several performances in New York and New Orleans. She has been on staff with the NOBA education programs In Motion, Creative Communities and the NORD/NOBA Center For Dance, as well as KidsmART, ArtSpot Productions, and the Douglas Community Coalition.

## Appendix D

### *2008-09 Board of Directors*

Deborah Alciatore  
 Michael D. Allday  
 Toni Van Zandt Bachmann  
 Karen Beck Zollinger  
 Dottie Belletto  
 Charlotte Bollinger  
 Maria Bonilla  
 Betsy Brien  
 Guy P. Brierre  
 Jacquee Carvin  
 Colleen H. Cook  
 Barry J. Cooper, Jr.  
 Gregory Curtis  
 John M. Duck  
 J.D. Estes  
 Cecile Gibson  
 Cathy Glaser  
 Monique Gougisha  
 Cathy M. Green  
 Claire Peragine Hunter  
 Dr. Bernard M. Jaffe  
 Dr. Carmen Labrie-Brown  
 Henry Lambert  
 Cynthia LeBreton  
 Theron Lewis  
 Pamela Halter Lupin  
 Christie Mintz  
 Max Moreno  
 Betty S. Noe  
 Barbara G. Spencer  
 Dr. Danille K. Taylor  
 Rosalyn Ditta Weinstein  
 Constance Willems  
 Phyllis Taylor

BRAVO President (Ballet Resource And Volunteer Organization)  
 Attorney, VICE CHAIR  
 Toni Van Zandt Realty, Inc.  
 AT&T  
 New Orleans Convention Company  
 Bollinger Shipyards  
 American Overseas Trading Corp., SECRETARY  
 ConocoPhillips  
 Capital One - TREASURER  
 Theater Producer  
 KPMG LLP  
 Cooper Law Firm, LLC  
 Windsor Court Hotel  
 Adams and Reese LLP - VICE CHAIR  
 Chalmette Refining, LLC  
 World Sports Travel - IMMEDIATE PAST CHAIR  
 Anti-Defamation League  
 Kiesewetter Wise Kaplan Prather, PLC  
 OCA, Inc.  
 McDermott International Inc.  
 Tulane University School of Medicine  
 Medical Center of Louisiana at New Orleans  
 RCB Builders, Inc.  
 Certified Public Accountant - CHAIR  
 Educator  
 The Lupin Foundation  
 Community Leader  
 Whitney  
 Betty S. and James A. Noe Foundation  
 Joe W. & Dorothy Dorsett Brown Foundation  
 Dillard University  
 Weinstein's  
 McGlinchey, Stafford - A Law Corp. - VICE CHAIR  
 Taylor Energy - LIFETIME MEMBER

## Appendix E

Hurricane Gustav

Form **990**

Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code  
(except black lung benefit trust or private foundation)

OMB No. 1545-0047

**2007**

Open to Public Inspection

Department of the Treasury  
Internal Revenue Service (702)

The organization may have to use a copy of this return to satisfy state reporting requirements.

For the 2007 calendar year, or tax year beginning **Jul 1**, 2007, and ending **Jun 30**, 2008

<input type="checkbox"/> Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Termination <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	Please use IRS label or print or type. See specific instructions.	<b>C</b> Name of organization <b>NEW ORLEANS BALLET ASSOCIATION</b>	<b>D</b> Employer identification number <b>23-7122403</b>
		Number and street (or P.O. box if mail is not delivered to street address) Room/suite <b>ONE LEE CIRCLE</b>	<b>E</b> Telephone number <b>(504) 522-0996</b>
		City, town or country <b>NEW ORLEANS</b>	State ZIP code + 4 <b>LA 70130</b>
		<b>F</b> Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	

Section 501(c)(3) organizations and 4947(a)(1) nonexempt charitable trusts must attach a completed Schedule A (Form 990 or 990-EZ).

H and I are not applicable to section 527 organizations.

H (a) Is this a group return for affiliates? ☐ Yes ☒ No

H (b) If 'Yes,' enter number of affiliates: ☐ Yes ☒ No

H (c) Are all affiliates included? ☐ Yes ☒ No  
(If 'No,' attach a list. See instructions.)

H (d) Is this a separate return filed by an organization covered by a group ruling? ☐ Yes ☒ No

I Group Exemption Number: \_\_\_\_\_

M Check ☐ if the organization is not required to attach Schedule B (Form 990, 990-EZ, or 990-PF).

G Web site: **N/A**

J Organization type (check only one) ☒ 501(c) **3** (insert no.) ☐ 4947(a)(1) or ☐ 527

K Check here ☐ if the organization is not a 509(a)(3) supporting organization and its gross receipts are normally not more than \$25,000. A return is not required, but if the organization chooses to file a return, be sure to file a complete return.

L Gross receipts: Add lines 6b, 8b, 9b, and 10b to line 12 **1,314,995.**

**Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances (See the instructions.)**

1	Contributions, gifts, grants, and similar amounts received:			
a	Contributions to donor advised funds	1a	405,133.	
b	Direct public support (not included on line 1a)	1b		
c	Indirect public support (not included on line 1a)	1c		
d	Government contributions (grants) (not included on line 1a)	1d	182,418.	
e	Total (add lines 1a through 1d) (cash \$ <b>587,551.</b> , noncash \$ _____)			1e 587,551.
2	Program service revenue including government fees and contracts (from Part VII, line 93)			2 391,903.
3	Membership dues and assessments			3
4	Interest on savings and temporary cash investments			4 33,894.
5	Dividends and interest from securities			5
6a	Gross rents	6a		
b	Less: rental expenses	6b		
c	Net rental income or (loss). Subtract line 6b from line 6a			6c
7	Other investment income (describe _____)			7
8a	Gross amount from sales of assets other than inventory	(A) Securities	(B) Other	
b	Less: cost or other basis and sales expenses	8a		
c	Gain or (loss) (attach schedule)	8b		
d	Net gain or (loss). Combine line 8c, columns (A) and (B)	8c	40.	
9	Special events and activities (attach schedule). If any amount is from gaming, check here <input type="checkbox"/>			8d 40.
a	Gross revenue (not including \$ _____ of contributions reported on line 1b)	9a	264,691.	
b	Less: direct expenses other than fundraising expenses	9b		
c	Net income or (loss) from special events. Subtract line 9b from line 9a			9c 264,691.
10a	Gross sales of inventory, less returns and allowances	10a		
b	Less: cost of goods sold	10b		
c	Gross profit or (loss) from sales of inventory (attach schedule). Subtract line 10b from line 10a			10c
11	Other revenue (from Part VII, line 103)			11 36,916.
12	Total revenue. Add lines 1e, 2, 3, 4, 5, 6c, 7, 8d, 9c, 10c, and 11			12 1,314,995.
13	Program services (from line 44, column (B))			13 941,362.
14	Management and general (from line 44, column (C))			14 201,912.
15	Fundraising (from line 44, column (D))			15 139,871.
16	Payments to affiliates (attach schedule)			16
17	Total expenses. Add lines 16 and 44, column (A)			17 1,283,145.
18	Excess or (deficit) for the year. Subtract line 17 from line 12			18 31,850.
19	Net assets or fund balances at beginning of year (from line 73, column (A))			19 615,784.
20	Other changes in net assets or fund balances (attach explanation)			20
21	Net assets or fund balances at end of year. Combine lines 18, 19, and 20			21 647,634.

BAA For Privacy Act and Paperwork Reduction Act Notice, see the separate instructions.

TEEA0101 12/27/07

Form 990 (2007)

**Part II Statement of Functional Expenses** All organizations must complete column (A). Columns (B), (C), and (D) are required for section 501(c)(3) and (4) organizations and section 4947(a)(1) nonexempt charitable trusts but optional for others. (See instructions.)

Do not include amounts reported on line 6b, 8b, 9b, 10b, or 16 of Part I.	(A) Total	(B) Program services	(C) Management and general	(D) Fundraising
<b>22a</b> Grants paid from donor advised funds (attach sch.) (cash \$ _____) non-cash \$ _____ If this amount includes foreign grants, check here <input type="checkbox"/>	<b>22a</b>			
<b>22b</b> Other grants and allocations (att sch.) (cash \$ _____) non-cash \$ _____ If this amount includes foreign grants, check here <input type="checkbox"/>	<b>22b</b>			
<b>23</b> Specific assistance to individuals (attach schedule)	<b>23</b>			
<b>24</b> Benefits paid to or for members (attach schedule)	<b>24</b>			
<b>25a</b> Compensation of current officers, directors, key employees, etc. listed in Part V-A. See L-25a Stmt.	<b>25a</b>	109,512.	0.	109,512.
<b>b</b> Compensation of former officers, directors, key employees, etc. listed in Part V-B	<b>25b</b>			
<b>c</b> Compensation and other distributions, not included above, to disqualified persons (as defined under section 4958(c)(1)) and persons described in section 4958(c)(3)(B)	<b>25c</b>			
<b>26</b> Salaries and wages of employees not included on lines 25a, b, and c	<b>26</b>	228,643.	228,643.	0.
<b>27</b> Pension plan contributions not included on lines 25a, b, and c	<b>27</b>			
<b>28</b> Employee benefits not included on lines 25a - 27	<b>28</b>	31,157.	14,918.	16,239.
<b>29</b> Payroll taxes	<b>29</b>	29,043.	19,254.	9,789.
<b>30</b> Professional fundraising fees	<b>30</b>			
<b>31</b> Accounting fees	<b>31</b>	2,608.	0.	2,608.
<b>32</b> Legal fees	<b>32</b>			
<b>33</b> Supplies	<b>33</b>	11,283.	0.	11,283.
<b>34</b> Telephone	<b>34</b>	5,618.	0.	5,618.
<b>35</b> Postage and shipping	<b>35</b>	14,134.	11,123.	3,011.
<b>36</b> Occupancy	<b>36</b>	42,910.	34,410.	8,500.
<b>37</b> Equipment rental and maintenance	<b>37</b>	29,914.	10,396.	19,518.
<b>38</b> Printing and publications	<b>38</b>			
<b>39</b> Travel	<b>39</b>	635.	0.	635.
<b>40</b> Conferences, conventions, and meetings	<b>40</b>			
<b>41</b> Interest	<b>41</b>			
<b>42</b> Depreciation, depletion, etc (attach schedule)	<b>42</b>	0.	0.	0.
<b>43</b> Other expenses not covered above (itemize):				
<b>a CONTRACT PERFORMERS</b>	<b>43a</b>	235,660.	235,660.	0.
<b>b MARKETING</b>	<b>43b</b>	83,153.	83,153.	0.
<b>c DEVELOPMENT</b>	<b>43c</b>	23,867.	23,867.	0.
<b>d GENERAL OFFICE</b>	<b>43d</b>	11,766.	8,961.	2,805.
<b>e BRAVO FUNDRAISING EVENTS</b>	<b>43e</b>	65,825.	0.	65,825.
<b>f SECURITY</b>	<b>43f</b>	2,865.	2,865.	0.
<b>g See Other Expenses Stmt.</b>	<b>43g</b>	354,552.	268,112.	12,394.
<b>44</b> Total functional expenses. Add lines 22a through 43g. (Organizations completing columns (B) - (D), carry these totals to lines 13 - 15.)	<b>44</b>	1,283,145.	941,362.	201,912.

Joint Costs. Check ☐ if you are following SOP 98-2.

Are any joint costs from a combined educational campaign and fundraising solicitation reported in (B) Program services? ☐ Yes ☒ No  
 If "Yes," enter (i) the aggregate amount of these joint costs \$ \_\_\_\_\_; (ii) the amount allocated to Program services \$ \_\_\_\_\_; (iii) the amount allocated to Management and general \$ \_\_\_\_\_; and (iv) the amount allocated to Fundraising \$ \_\_\_\_\_.

BAA

TEEA0102 08/02/07

Form 990 (2007)

## Appendix F

## **NOBA Strategic Plan**

### Connections, Growth, and Infrastructure

**Key Personnel:**

Jenny Hamilton  
Suzanne Stack Hirsch  
Sandra Fank  
Wanda Fulton  
Laura Burkhart

**Consultants/Advisors:**

Artistic Logistics, LLC  
Lisa Mount



NOBA Mission: To cultivate understanding, appreciation, and enjoyment of dance  
*through performance, education, and community service*

### **Organization Strategic Directions**

- 1. Creating Multiple Connections to Dance**
- 2. Building a Platform for Growth**
- 3. Expanding NOBA's Infrastructure to Meet Demand**

### **Organizational Priorities**

- Dance is a core component of lifelong learning.
- NOBA presents a season of international caliber dance.
- People have access to and participate in dance.
- Partnerships and collaborations foster the art of dance.
- People understand more about dance.
- NOBA remains financially solvent.

### **Strategic Direction 1: Creating Multiple Connections to Dance**

#### **Goal 1: Diversify Public Programming**

Objective: Commission new dance work annually

Strategies:

- Create designated fund for new work creation
- Facilitate contacts for dance artists with New Orleans tradition-bearers (musicians, SAPCs, Mardi Gras Indians and more) to create work that reflects New Orleans' unique cultures
- Identify additional musical partners to provide increased live music at performances
- Operate a dance lab for national, regional, local companies to create new work in NOBA's space

Objective: Present performances in multiple venues

Strategies:

- Vary sites for NOBA performances
- Create designated fund for mainstage artistic needs
- Present joint performances with other arts and community organizations
- See SD#2 objective about festivals

#### **Goal 2: Deepen NOBA's Service to the Dance Field**

Objective: Maintain and enhance NOBA's position as a leader in the dance field

Strategies:

- Support block booking and other collaborations with Central Gulf Coast region organizations
- Maintain active role in national and state networks

Objective: Provide services to New Orleans dance artists and companies

Strategies:

- Craft a "tour readiness mentorship" program
- Use dance lab as a catalyst and resource for local companies
- Continue to commission work from local dance artists

### **Goal 3: Maintain and Expand Educational Programs**

Objective: Continue life-long learning programming

Strategies:

- Ensure that consistent weekly training is available for students at open sites and in pre-professional program
- Continue high-quality residencies and other dance experiences for school populations (teachers and students)
- Explore growth opportunities in senior and adult programs
- Use NOBA SPACE to provide regular dance education opportunities, including lec-dems, open rehearsals, and history/heritage programs
- Explore opportunities to serve special needs populations at NOBA SPACE
- Offer learning experiences as add-ons to mainstage performances

Objective: Continue and build partnerships to improve arts education through dance

Strategies:

- Assess community needs and partner capacity for new programming
- Train artists to provide in-school experiences on a consistent basis

### **Goal 4: Tell Our Story**

Objective: Ensure consistent contact with multiple publics

Strategies:

- Seek pro bono PR help to solidify messaging and create a consistent campaign
- Maintain strong looks and imagery
- Maintain prominence of educational programming in all promotional materials
- Maintain and grow both email and standard mail databases, continue full staff orientations to databases
- Engage life-long learning program participants and parents in mainstage performances, as audience and more

Objective: Continue strong media relationships

Strategies:

- Ensure regular feature stories, blog entries, media coverage for both performances and education programs
- Create feature stories: "dancer of the month" highlighted on website
- Highlight visiting company school residencies and workshops at open sites

Objective: Build a formidable online presence

Strategies:

- Expand website and increase ease of use
- Initiate online social networking program
- Establish education program participant blogs
- Ensure easy web-based ticketing
- Audit site and information to ensure full accessibility

## **Strategic Direction 2: Building a Platform for Growth**

### **Goal 1: Expand & Diversify Audiences**

Objective: Strengthen relationships with new and current partners

Strategies:

- Match partnerships to programming
- Use NOBA SPACE as a reciprocal partnership resource

Objective: Present performances in multiple venues

Strategies:

- *See SD #1, Diversify Public Programming*

Objective: Mount a robust marketing campaign to targeted markets

Strategies:

- *See SD #1, Tell Our Story*
- Continue to use database segmentation to support individual performances

Objective: Research feasibility of a festival or new event to draw dance enthusiasts

Strategies:

- Research other festivals, design scenarios appropriate to city demographics and venues
- Conduct pilot festival inside existing season planning

### **Goal 2: Deepen Volunteer Resources & Involvement**

Objective: Develop relationships with young professionals to create new volunteer network

Strategies:

- Identify professional associations and cultivate key relationships
- Explore shared opportunities with other arts/social service organizations

Objective: Develop an 'alumni' association for pre-professional students and parents/guardians

Strategies:

- Assemble existing records into alumni database
- Organize events that promote social networking, performance attendance
- Build alumni volunteer and donor corps

Objective: Review current board practices; research and adopt better practices

Strategies:

- Assess effectiveness of current structures, including committees (orientation, bylaws, structure & composition, recruitment, evaluation, etc.)
- Enrich board meetings to build ownership in & excitement for programs
- Increase board interaction with scholarship recipients

Objective: Deepen BRAVO's connections to NOBA

Strategies:

- Build greater understanding of dance as an art form
- Work together on welcoming new BRAVO members

### **Goal 3: Stabilize & Grow Revenue**

Objective: Add development staff

Strategies:

- Increase research of potential funding sources
- Increase contacts with potential corporate sponsors

Objective: Maintain and increase earned revenue

Strategies:

- Increase subscription sales
- Expand earned revenue from teaching and contracts (contingent on space)

Objective: Increase support from individuals

Strategies:

- Explore and develop planned giving
- Develop new donor incentives
- Create Board VP position for donor relations
- Increase board training on how to solicit contributions from individuals

Objective: Strengthen financial management practices

Strategies:

- Develop and approve a cash reserve policy

### **Strategic Direction 3: Expanding NOBA's Infrastructure to Meet Demand**

#### **Goal 1: Secure appropriate space(s) for administration and programming**

Objective: Secure temporary office space

Strategies:

- Complete inventory of space needs
- Identify and budget for appropriate space

Objective: Identify studio space (aka NOBA SPACE)

Strategies:

- Inventory available and appropriate spaces
- Determine lease vs. purchase priorities

Objective: Create Facilities Operations Plan

Strategies:

- Plan building opening for maximum visibility
- Create on-going operations protocol
- Determine staffing needs

#### **Goal 2: Expand staff and faculty to match work loads**

Objective: Identify priority administrative positions

Strategies:

- Use work journals to analyze current workload and job descriptions
- *See SD#2, add development staff*

Objective: Identify priority artistic positions

Strategies:

- Create contingency plans for artistic staff expansion based on NOBA SPACE: FT Artistic Director, FT teaching artists, PT teaching artists
- Find long-term funding to support artistic staff

**Goal 3: Maintain climate of professional-ism and growth**

Objective: Ensure continuing professional development for all staff

Strategies:

- Identify and budget for participation in local, state, regional and national conferences
- Build learning plans for each staff member, artistic faculty

Objective: Review personnel policies and adapt as needed

Strategies:

- Document emergency succession plan

**Goal 4: Maintain climate of professional-ism and growth**

Objective: Build structured support systems for staff and board

Strategies:

- Conduct regular evaluations of staff and board
- Orient new and existing staff to NOBA organizational culture
- Continue to build a climate that encourages innovation and creative problem-solving

Objective: Conduct regular planning reviews

Strategies

- Hold annual strategic planning review with both staff and board
- Hold quarterly forecasting and calendaring meetings with staff

## **Evaluation Tools and Measures Annual Review**

Evaluation Strategy:

- Review, redesign, and implement structure for the evaluation of all programs and services

Evaluation Tools and Measures for Indicating Success

**Surveys (participants of events, programs, and performances)**

**Media Response/Review**

**Meetings with stakeholders**

**Oral Feedback (participants, stakeholders, media, audience)**

**Consultant Observation/Evaluation**

**Staff Review**

**Board Review**

**Executive Director Review**

**# people involved**

**# activities executed**

**Annual Report/Audit**

## **Rationale**

Through an intensive process of interviews, board/staff retreat, and surveys, the Board and staff of the New Orleans Ballet Association worked with Artistic Logistics – Lisa Mount to identify the priorities, strategic directions, and goals outlined in this document.

## **Values and Principles**

It is important to note that the underlying guiding principles for the strategic plan are reflected in an attempt to ensure that the greater New Orleans area and the Central Gulf region are aware of the value of the art of dance to their lives and have equitable access to quality dance programs and services. NOBA is committed to maintaining inclusiveness in all programs and services and to providing dance experiences of only the highest quality. In addition, NOBA is committed to keeping programs and services accessible, reflective of the diverse population and geography of the area, and responsive to the needs of the people of this community. Providing opportunities for professional development of our local artists and arts administration students remains core to NOBA's overall mission. Indeed, inviting participation, inclusion, and accessibility insures a quality future for the art of dance in the Central Gulf region.

The arts help build a better future for our youth. NOBA must continue seeking to cultivate their interest and participation in dance, with programs such as the free, after school dance classes offered through the NORD/NOBA Center For Dance, St. Bernard After School Program, and the ancillary programs, and the initiatives for schools. Further, by providing early familiarity with dance through NOBA programs and services, we will see the development of future arts leaders, donors, and participants. NOBA must also continue to develop programs that foster lifelong learning among participants of all ages with tools that educate and enlighten, while enhancing quality of life.

Finally, NOBA must carefully nurture stewardship in the art of dance to not only strengthen the financial condition, but also augment and preserve resources for future generations. To realize our goals, NOBA must continue to improve upon governance and management structures, which will enable NOBA to enact the plan more fully and effectively. If governance is the way we marshal talent to create the vision for NOBA, management is the way we structure the actual course of action to make the vision come alive.

## Appendix G

December 1, 2008

Dear ...

For nearly 40 years, the New Orleans Ballet Association (NOBA) has proudly served the New Orleans community through world class dance performances, classes, and activities. NOBA annually employs more than 20 local artists and provides over 2,500 dance classes and activities for nearly 25,000 people. In fact, more than 90% of all of NOBA's programming – on the stage, in the schools, and at community centers – is completely free for our youth, seniors, and families. Your commitment to dance as a patron allows us to make dance accessible to everyone in the New Orleans community. For as little as \$10 per month, you can assist us with one child for the summer intensive camp for four weeks. **Eighty-five cents of every dollar you contribute goes directly to programming.**

The award-winning NOBA programs are nationally recognized for excellence, but the more than 250 families we reach at nine locations in three parishes are the reason we continue striving to bring dance to life. *"I don't know how you do it. You're everywhere all the time,"* says a 5-year parent. You, our donors, make it possible to be everywhere.

A 6-year parent states, *"The administration and teachers of NOBA are founding the best qualities in our children, motivate and guide them through difficult times in teen-age years. Every person in this organization knows my daughter and what is best for her."*

A 9-year parent states, *"As a parent, I watched my child grow from a shy little girl, to a beautiful confident young lady in everything she does."*

NOBA works with children to make dance accessible, giving them skills to succeed as a citizen and as a dancer. A 5-year parent says, *"Being involved in the program has given my child more confidence and knowledge concerning the advantages of being a healthy individual, both physically and mentally."*

Despite the breadth of the programs, the quality of NOBA programs never waivers. The artists that teach our youth, adults, and seniors, give of themselves everyday. *"In addition to the quality training, my daughter has increased her confidence due to her teachers' praise and the confidence they have in her. If she truly wants to dance professionally, NOBA is the place for her,"* says a 2-year parent. *"Your program allows children regardless of their ethnicity to strive in the dance world,"* says a 5-year parent.

These statements come from the very families that you support each year with your tickets, donations, and contributions. It is best said in the words of one mother, *"Thank God for the donors that contribute to this program."* During this holiday season, we hope that you will consider giving to our programs.


Sincerely,

Cynthia LeBreton  
Board Chair

Jenny R. Hamilton  
Executive Director



## Appendix H

<b>New Orleans Ballet Association 2008/2009 Pledge</b>	
	Name (as you wish to be acknowledged) _____ <input type="checkbox"/> Enclosed is my one time payment <input type="checkbox"/> Monthly draft <input type="checkbox"/> Send Reminders I would like to support with my one time gift of \$ _____ I would like to pay in installments: <input type="checkbox"/> Contributor, \$10 per month <input type="checkbox"/> Sustainer, \$25 per month <input type="checkbox"/> Benefactor, \$50 per month <input type="checkbox"/> Patron, \$75 per month <input type="checkbox"/> Choreographer, \$100 per month <input type="checkbox"/> Other, \$ _____
	<input type="checkbox"/> Please charge by bank account directly (NOBA will send you appropriate forms) <input type="checkbox"/> Please charge my credit card : <input type="checkbox"/> Visa <input type="checkbox"/> MC <input type="checkbox"/> AMEX <input type="checkbox"/> DISC Acct. No. _____   Exp. Date _____ Signature _____
	<input type="checkbox"/> My company has a matching gift plan. <input type="checkbox"/> Please call me about a planned gift. <input type="checkbox"/> I prefer for my donation to remain anonymous.
	<div style="text-align: right;">Thank you !!!</div>

## Appendix I

**NEW ORLEANS BALLET ASSOCIATION****PROPOSAL****DELTA AIRLINES****“OFFICIAL AIRLINE OF THE NEW ORLEANS BALLET ASSOCIATION”**

The New Orleans Ballet Association respectfully requests consideration of the continuation of more than 15 years of support from **Delta Air Lines**.

New Orleans Ballet Association will provide the following benefits in return for sixteen (16) round trip domestic airline tickets to be used for guest artists, young artist enrichment through study outside of New Orleans, professional development opportunities, and viewing of dance companies that are being considered for booking by the New Orleans Ballet Association. Delta Air Lines shall receive recognition as the “Official Airline of the New Orleans Ballet Association” and as a performance sponsor of a Main Stage presentation.

- **Full page advertisement** in the 2007-2008 season program book inserts  
Distribution: 25,000 (required artwork to be supplied by Delta)
- Acknowledgment of **Delta Air Lines, the Official Airline of the New Orleans Ballet Association** in the 2007-2008 season brochure. Distribution: 25,000
- Acknowledgment of **Delta Air Lines, the Official Airline of the New Orleans Ballet Association** in the 2007-2008 season program book. Distribution: 25,000
- **Four prime orchestra seats** to all evening subscription performances on the 2007-2008 season upon request by a Delta representative. Delta will be contacted one month prior to each evening performance to confirm number of tickets to be used.  
Value: 4 x \$80 x 5 performances = \$1,600
- **Discount on tickets** for Delta employees for the 2007-2008 season - 15% off
- **Delta Air Lines** will be given first consideration when the New Orleans Ballet Association must purchase air travel.
- **Recognition as Performance Sponsor:**
  - **Printed Advertisements** placed in *Gambit Weekly* and *Times-Picayune* Distribution: 900,000
  - **Printed Material** (includes direct mail postcards, four color mailer, flyers) Distribution: 20,000 + homes
  - **Title Page of Program Insert** with preferred logo placement and Sponsor Highlight. Distribution: 2,300
  - Corporate name listed in all **press releases** related to sponsored performance. Distribution: over 118 newspapers, magazines, radio stations, and television stations
  - **Corporate name printed on all tickets** for sponsored performance. Distribution: 2,300
  - Recognition as Performance Sponsor on evening of performance (including **pre-curtain announcement with Delta Air Lines representative**)
  - Invitation to VIP Intermission Reception with complimentary wine
  - Invitation to NOBA donor receptions and special events

**Total Value of Benefits: \$34,000**

Appendix J

Home

Performances

Tickets

Visit New Orleans

Support NOBA

About NOBA

Dance Classes

For Youth

For Adults


For Teachers

New Orleans Ballet Association

NOBA

Join our mailing list

Stay informed about upcoming events, the latest news, and ticket offers.




Registration Dates Announced for Summer 2009 Classes at Center For Dance Sites and Summer Intensive 2009 Guest Artists Announcement!

Single Tickets On Sale for **Diavolo**

support


Keep the arts and arts education alive in New Orleans! We depend on generous donations to stage performances and maintain programs.



DIABOLO


May 9, 8pm

Mahalia Jackson Theater of the Performing Arts



Watch clip on YouTube

Photo by Angela Weiss

NOBA's Official Airline  DELTA Hotel Sponsor

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## Appendix K



## **VITA**

Megan Workman was born outside Detroit, Michigan and later moved to Jacksonville, Florida at the age of nine. After graduating from a Quaker boarding school in Newtown, Pennsylvania, she attended Beloit College in Beloit, Wisconsin. In May 2006, she graduated with a Bachelor's degree in Arts History and a minor in Museum Studies. She is currently completing a Master's degree in Arts Administration at the University of New Orleans. Her diverse work experience includes several summer internships at regional art museums, two years as gallery assistant at the Jonathan Ferrara Gallery in the Warehouse Arts District, and two years as a graduate assistant in the Arts Administration Department at UNO. She will be continuing on to Tulane University in the Fall of 2009 to begin a second Master's program in Art History.