PROMOTING SYMPHONY SUSTAINABILITY: A CASE STUDY OF THE
HOUSTON SYMPHONY’S *THE PLANETS – AN HD ODYSSEY FILM PROJECT*

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CHAPTER I
INTRODUCTION

In 2008, the world economy became entrenched in the worst economic crisis since the Great Depression. Businesses in every industry found themselves in a struggle to survive. Amongst the hardest hit sectors was the non-profit world. These organizations fought to maintain their place in their communities by existing on smaller and fewer donations as patrons and businesses cut discretionary spending. While some were forced to close their doors, the survivors were forced to reevaluate their business structures as they realized they had few resources with which to remain sustainable during such tumultuous economic times. Sustainability is defined as the capacity to endure, and the 2008 recession made it clear to the entire business world that sustainability is something that could no longer be ignored.

The orchestra industry in particular has been hit with the reality of today’s market, and orchestras struggle more than ever to meet the challenge of balancing artistic excellence and business sustainability. Orchestras throughout the United States face similar threats against their survival. The troubled economy, organizational instability and tension, and an overall decline in classical music education and popularity all contribute to dwindling ticket sales and bases.
Ticket sales alone are not enough to sustain an orchestra’s daily operations. Generally, orchestras in the United States rely on donations, grants, and sponsorships to survive. In his 2008 report *The Economic Environment of American Symphony Orchestras*, Standford University professor Robert J. Flanagan explored the fluctuations in the financial situations of thirty two US orchestras from the 1987/1988 to the 2003/2004 concert seasons. Flanagan concluded that on average performance income, such as ticket sales and recording or touring revenue, only covered forty five percent of performance expenses such as artistic personnel, production, marketing, and general administration costs. Flanagan states that this resulting performance income gap has worsened and will continue to worsen in the future. Often orchestras who find themselves up against dwindling ticket sales, smaller donations, and rising production costs will try to maintain the status quo and ignore the problem in order to give a public appearance that everything is fine. These orchestras continue to increase their debt instead of responding to the crisis at hand.

Unfortunately, ignoring the problem is never the solution and denial eventually catches up to the organization. In recent years, several orchestras have entered into bankruptcy proceedings due to overwhelming economic pressures – the Honolulu Symphony, the Louisville Orchestra, and the Albuquerque Philharmonic Orchestra are examples of orchestras that were forced to either close their doors or reorganize. In 2011, in what was a shock to the industry, the Philadelphia Orchestra filed for Chapter 11 bankruptcy protection, citing a high pension burden and mounting losses from declining
ticket sales and donations as the main causes. This was the first major US orchestra to take such drastic measures. The orchestra utilized the bankruptcy protection to restructure and take a hard look at its operations. In July 2012, the Philadelphia Orchestra emerged from bankruptcy protection on schedule with a court approved reorganizational plan that included a $5.49 million settlement of its debts and liabilities, the layoff of ten musicians, and salary cuts.

A second problem plaguing US orchestras is organizational tension that can develop between management and musicians. As economic circumstances bear down on an orchestra, management look to musicians’ salaries as a place to cut costs, as it is the largest expenditure in the budget. Most orchestras have contracts with the American Federation of Musicians union, and these contracts outline every aspect of an organization’s relationship with each musician. The contract dictates everything from base salary and vacation time to the maximum number of orchestra services allowed per season. Needless to say, musicians protest against being the brunt of budget cuts. Most feel that they should not bear the burden of what is seen as management’s inability to raise enough money to protect the artistic quality of the organization and that any reduction in salary will ultimately compromise the artistic excellence of the orchestra. This situation creates an adversarial atmosphere that may ultimately result in a strike, an action that seriously damages public perception of the institution. These types of situations, seen very recently at the Detroit Symphony Orchestra and the Louisville Orchestra, are extremely detrimental to organizational morale. Often these fights
compound the orchestra’s economic distress, as there are no concerts to bring in ticket sales, and donations and financial support dries up. Patrons are inclined to choose sides. Orchestras that face this situation often work out a temporary solution, but these settlements are tainted by lingering resentment and doubt both within the organization and in the public at large. These arguments diminish the overall mission of the orchestra, and it can take years for the orchestra to reestablish a sense of internal security and stability.

Orchestras are also facing an increasing problem that is directly proportionate to ticket sales – the decline in classical music popularity and knowledge. Multiple studies, such as the 2009 League of American Orchestra’s Audience Demographic Research Review and National Endowment for the Arts’ 2008 Survey of Public Arts Participation, show that a majority of an orchestra’s audience had exposure to the genre during childhood, mostly through learning an instrument in school. Unfortunately, public schools are also faced with budget cuts. Music programs are often among the first cut when schools must operate with reduced funds. The loss of early exposure to classical music decreases the likelihood that future generations will develop any appreciation of classical music. Many organizations are trying to fill the void created by the loss of school music programs by taking music education into their own hands, but this is only a small step towards compensating for the loss of arts education funding. Orchestras are quickly learning that in order to secure future loyal audiences, they must stretch beyond the old formula and develop new, innovative programs that relate to younger generations.
When the casual observer takes a look at current trends in the orchestra industry, the future outlook seems bleak. However, several orchestras have started to rally against current trends and to think creatively with new, innovative ways to reach out to new patrons as well as reconnect with loyal patrons. These orchestras are also taking these innovations a step beyond audience development – they are creating new programs which they hope will create more dependable revenue streams. By taking a closer look at the success of programs produced by the Houston Symphony and other US orchestras, as well as taking the findings of the Knight Foundation’s *Magic of Music* sustainability study into consideration, one can see how this new trend is enabling orchestras to bolster the bottom line while engaging audiences in fresh ways.
CHAPTER II
EXPLORING THE MAGIC OF MUSIC STUDY

U.S. orchestras have a long history of finding sustainable solutions when facing hardships. For years, funders would throw money at orchestras that were in financial crisis, hoping that the funds would help to turn the organization around and create a healthy organizational foundation. Unfortunately for those orchestras, most of those grants did not come with any guidance on how to turn the tide. Popular “Save Our Symphony” initiatives merely placed a bandage on a hemorrhaging organization, and the fix was short lived. In 1993, when most national funders were turning their backs on US orchestras, the Knight Foundation took a leap of faith and embarked on what would become a groundbreaking initiative that tackled an array of industry questions and issues. Many of the lessons learned from the Knight Foundation’s Magic of Music initiative are still relevant to orchestras working toward sustainability today.

Magic of Music - Reasoning

In the late 1980’s and early 1990’s, the Knight Foundation was inundated with requests for funds to save local symphonies within its twenty-six focus communities.
The Foundation realized these funds would not be a permanent solution to fiscal crises. Only institutional change would have a long term effect. Most of the organizations requesting emergency funds also suffered from a lack of unified leadership; the staff, board, and musicians disagreed on how best to move forward. Armed with this information, the Knight Foundation decided to begin granting money to institutions with the end goal of transformational change. The initiative, named *Magic of Music*, had the following mission statement: “Providing venture capital to selected symphony orchestras to encourage them to undertake targeted entrepreneurial activities beyond the scope of their ongoing operations.” In addition to the mission statement, the following three goals were identified:

- To stimulate orchestras to evaluate themselves.
- To identify opportunities for systemic change that strengthens the organization.
- To design creative approaches that address intrinsic needs, systemic problems or new opportunities.

**Phase I**

Phase I of *Magic of Music* began with “the idea that transformations in the concert hall experience would reinvigorate the relationship of orchestras with their audiences and, in turn, help reverse the decline in orchestras’ audience base” (Wolff 5). After a tumultuous application process that required the Foundation to offer a significant amount of guidance to candidates, ten orchestras were chosen to receive funds. These orchestras were to put the funds toward new programs that would transform the concert experience
and increase the bond between the orchestra and its audience. Some of these participants and programs included:

- The New World Symphony – The Knight Foundation funds were used to help young musicians to develop communication skills so they would be better equipped to connect with audiences.

- The Philadelphia Orchestra – Funds were used to test the use of video screens for its hall as an audience enhancement. The screens featured ‘close up’ images of the performing musicians and conductor, allowing audiences to feel more engaged with the performance visually.

- Oregon Symphony Orchestra – The organization developed a new concert series called Nerve Endings. These concerts featured symphonic music, script, video and other musical genres. The organization hoped to reach younger audiences with the series.

After three years, the Foundation assessed the success of the *Magic of Music* initiatives. A few of the programs were seen as successful beginnings. The New World Symphony’s focus on non-musical development proved indispensable for musician training, and the Foundation felt that the initiative should be continued into Phase II. The initiative allowed the organization to foster the musicians’ career development, as well as produce musicians with valuable skills that could be utilized by an orchestra’s marketing and development departments. In Oregon, the Nerve Endings concert series did attract new audience members to the hall, most of which were under the age of forty. Another
hallmark of the initiative’s success was that other orchestras began to borrow elements of the series for their own concert enhancements. Other programs, including Philadelphia’s foray into new video technology, were not successful and the organization had to course-correct within the grant’s time period to focus the funds on other tasks. Philadelphia underestimated its core audience members’ love for a traditional concert setting and it received a large backlash against the ‘distracting’ video elements the initiative introduced. The technology was quickly pulled from the orchestra’s production plans. The remainder of the Foundation’s funds went towards focusing on internal organizational communication. While this positively benefited the orchestra, the Foundation decided Philadelphia’s initiative had run its course and did not renew it for Phase II. It was agreed by the Foundation’s staff that three years was not enough time to determine if the programs would be long term successes. The staff was able to identify and challenge a number of orchestra industry myths. Some of these challenges include:

- Music and its performance could not develop large audiences on its own.
- New audiences could be attracted with new programming and event augmentation, although there was no immediate evidence that those new audiences could be retained.
- So called “audience development efforts” often benefitted existing subscribers as opposed to bringing in new patrons.
Orchestras must strive to balance new efforts and continuing to meet the needs of existing patrons. Orchestras who focus too much attention on attracting new audiences run the risk of alienating their most loyal patrons.

It is imperative for orchestras to share ideas in order to continue industry development.

This information encouraged the staff to continue *Magic of Music*, but with the understanding the criteria for awarding grants would be revised.

**Phase II**

The Knight Foundation started Phase II of *Magic of Music* with a new set of goals:

- Supporting programs that produce a demonstrable increase in the ticket buying audience.
- Helping orchestras develop a stronger sense of connection with new and potential audiences.
- Enhancing relationships among musicians, orchestras, audiences and communities.
- Developing a clearer understanding of the market dynamics in which symphony orchestras seek to build and nurture audiences.

Other changes to the initiative included placing orchestras with similar projects into consortia to share what they learned, expanding into more Knight Foundation
communities, initiating focused audience research for all participating orchestras, developing avenues to communicate and report all of the initiative’s findings to the larger orchestra industry, and utilizing tighter evaluation techniques. Using these guidelines, fifteen orchestras (including some orchestras from Phase I) were chosen for Phase II Magic of Music grants.

A large aspect of Phase II was The Classical Music Consumer Segmentation Study which was developed as part of its effort to gather focused audience research for all participating orchestras. Participation in this study was a requirement of the grant, allowing the orchestras to see not only national audience trends, but trends specific to their own market as well. The study aimed to test a variety of industry assumptions about audience behaviors and characteristics.

The Foundation’s study illuminated unexpected findings that contradicted what the industry thought it knew about audiences. Orchestras that wanted to reach this untapped audience base were now faced with a dilemma – should the results be trusted enough to warrant such significant changes in the orchestra’s business model? Would those modifications help lead to the so-called transformative change necessary to create a successful and sustainable symphony orchestra? According to Wolff, the study “was a call to reconceptualize the constituent base for the art form at the community level, to work toward alternative approaches in programming, new product-delivery models and new marketing paradigms. It implied that the deeply entrenched business model might be outdated and that a different kind of community analysis was required concerning cultural contexts, programming interests, and even the capacities for public and private
support.” (Wolff, 33) It took orchestras some time to embrace the results of The Classical Music Consumer Segmentation Study, but its impact is still being seen in orchestra efforts today.

**Findings**

Overall, the Knight Foundation’s *Magic of Music* initiative had a much broader impact on the orchestra industry than originally imagined. It took a deep look at how the industry needed to change in order to better survive a constantly changing economic and cultural environment. The initiative taught both orchestras and funders a multitude of lessons, including the following:

- The problems of orchestras stem not from the music they play but from the delivery systems they employ.
- Orchestras that are not relevant to their communities are increasingly endangered.
- Transformational change in orchestras is dependent on the joint efforts of all members of the orchestra family – music director, musicians, administration, and volunteer leadership and trustees.
- No single magic bullet will address the many serious problems that orchestras face.
- Dollars are only a small part of what a committed funder can contribute to assist institutions and a field.
• Funders need to be clear with themselves and with grantees about desired outcomes (Wolff 49-51).

The Knight Foundation’s *Magic of Music* lessons continue to be relevant. Many of the obstacles faced by orchestras today can be tackled using the advice and research generated by the initiative. Orchestras can utilize this study to better understand the problems they face and to develop programs that work toward the ‘transformative change’ that could lead to sustainability.
CHAPTER III
THE PLANETS – AN HD ODYSSEY CASE STUDY

History of the Project

In May 2006, the Houston Symphony presented Gustav Holst’s *The Planets Suite* along with the Hatch Productions film of planets imagery. As Houston is known as the Space City, the orchestra’s artistic and operations team thought it would be appropriate to work with neighbor NASA and asked local astronauts to participate as the film’s narrators. Immediately following the first rehearsal, the astronauts approached the symphony’s management about two things. First, they were thrilled to be a part of the collaboration; and second they asked if the organization realized how out of date information and images presented were? The astronauts explained that their research had uncovered an array of new data and facts about the solar system, and there were new high definition (HD) quality images beamed back to NASA on a daily basis. They also decided to rewrite the script to showcase this new knowledge. The weekend was a great one for the orchestra, but it quickly became a very important weekend within the history of the organization – the weekend a new collaborative, innovative project was born.
NASA has been a longtime friend to the Houston Symphony. In fact, Maestro Hans Graf is the only conductor on Earth who conducts with a baton that has been to space. The orchestra has featured several astronauts in past concerts, including performing the premiere of *Big Smoke*, an original composition by astronaut Chris Hadfield. After the concerts in May 2006, the symphony’s management knew that initiating a collaboration with NASA on a new, updated visual production of *The Planets* was the right move. They knew NASA was enthusiastic, but they had one more crucial party to convince: Maestro Graf. General Manager Steve Brosvik describes Graf’s hesitation: “I think Hans was hesitant at the very beginning. As the conversations with Hans, our astronaut colleagues and Matthew [Van Beisin, HS Executive Director 2006 – 2009] continued, it became clear to everyone that we could create a much better product and there was no orchestra better than Houston to make it happen.” (Brosvik interview) Hans spoke about the project with the *Houston Chronicle* and mentioned his initial hesitation when thinking about adding multimedia elements to music:

Adding images to musical performance is not for all occasions. Bach or Beethoven might be better left unadorned. In the depth of my soul, I’m hesitating, but I’m not with this piece. This piece is like huge musical posters.” Besides, Graf added, “Which other great orchestra would be allowed or entitled to do such a thing more than us? We are here. We are living in Houston, and Houston is the center of this. (Dooley)
With the Maestro on board, the artistic team began the search for a filmmaker for the project. To be successful, it would be necessary to find a filmmaker capable of combining Holst’s music with the imagery in just the right way. While researching, the team came across the film *In the Shadow of the Moon*. The movie told the story through images and interviews of the US’s early attempts to get man to the moon. One of the film’s producers was Duncan Copp, a British scientist and filmmaker. After more research and conversations with Copp, it became clear that he was the man for the job. According to his biography, Copp has worked with BBC and National Geographic to produce space-centric documentaries. When asked about the opportunity to create *The Planets – An HD Odyssey* with the Houston Symphony, Copp had this to say:

> It’s a joy. With this project you would think it would be relatively straightforward to pick out the photographs to go with the music. But as we went along, we realized it just got bigger and bigger. It wasn’t the marrying of the music and the images; it was the technical aspects of using these massive high-definition pictures for the first time. That really pushed the envelope of our editing techniques. Some of the images are so large that the software couldn’t open them. (Copp interview)

Another important quality that Houston found in Copp was his understanding that the music should not play second fiddle to the images. He said:

> …Because the score or the music to the film, I always think, is intrinsic. So I never see the music as secondary in anything I produce. With regards to this project, we already knew what the music was, which was great. It’s a fantastic score. So from that point of view, I guess it’s slightly unique in the way that we came about it. The music was the scaffolding. (Copp interview)
As the January 2010 premiere date approached, the buzz about the project grew. Ticket sales were looking better than expected, and the Houston Symphony was able to put together a small East Coast tour to New York and Florida to show off the project to other parts of the country. The project seemed to be giving all members of the Houston Symphony family – the board, staff, musicians, and patrons – something to be positive about after years of struggle. At that point, only time would reveal if the four years of exhaustive research, hard work, and financial investment would pay off.

Reception

It can easily be argued that the Houston Symphony had a success on its hands. Originally, the orchestra was slated to perform the premiere of the work three times during a normal subscription weekend run. However, tickets were in such demand the organization had to add not one, but two additional performances. Jones Hall, the Houston Symphony’s home, has a capacity of 2,600 and the orchestra traditionally sells half of the house with most performances. *The Planets – An HD Odyssey* was a different story. The chart below reflects the weekend’s ticket sales vs. Jones Hall’s capacity:
While some may argue that the orchestra could only do so well in its home town, the organization proved this to not be the case. Immediately following the premiere in Houston, the orchestra embarked on the tour to New York and Florida. Nine months later the orchestra took the concert to the United Kingdom for a seven city tour. Ticket sales did not disappoint:

Figure 1.1 Comparison of Jones Hall Capacity to Opening Weekend Ticket Sales
Overall, reviews of *The Planets – An HD Odyssey* were mixed. Some could not get past the idea that Holst was focused on the astrology, not the astronomy. Critic Zachary Lewis, from *The Cleveland Plain Dealer* had this to say:

> Conceptually, too, Holst's music was at cross-purposes with the display. Where the images fostered an appreciation of physical objects, the score portrays the planets as astrological personalities, embodiments of gaiety, peace, and violence. It's a jarring contradiction that even Graf's frank introductory comments from the stage Sunday couldn't explain away. (Lewis)

Others, however, appreciated the contrast and embraced what the Houston Symphony strove to do with the film. After Houston debuted the film at Carnegie Hall in January 2010, New York Times critic Anthony Tommasini said,
The images in the movie…were often astonishing. Photographs from rovers and satellites, radar images and computer-generated graphics were combined to give the audience the impression of circling individual planets and sometimes flying over their awesomely barren landscapes…There is, of course, a film-score-like quality to the music, and combining it with imagery has been done before, though not to my mind with such sophistication. (Tommasini)

The message the Houston Symphony used to promote these performances was carefully crafted to indicate that the film is a vehicle for displaying the beautiful NASA images as well as providing audiences a new experience with the music. In fact, in the film’s introduction, one of the Jet Propulsion Lab scientists exclaims, “Holst got it wrong!” Houston General Manager Steve Brosvik had this to say in response to the critics:

Holst did write his suite about thinking about the mythological figures represented by each musical section. Since 1918 with the developments in astronomy, human space travel to the moon, and the unmanned missions to the physical planets which carry the mythological names, it makes sense to bring forward these new and exciting images of our solar neighborhood. We are in Houston, the home of the space program. I actually do not think that using images of the physical bodies versus the mythological bodies is any different than Disney creating images for Fantasia and Fantasia 2000 or frankly a film producer making astute choices about which classical pieces to use as the score to their film. (Brosvik interview)

Despite the debate between critics, one thing is clear: audiences love the collaboration. Both concert attendance numbers and financials back up this assertion. Not only do most concerts featuring the film practically sell out, Houston has sold over 5,500 DVDs and Blu Rays of the film to date. These sales are mostly made at concerts, but Houston has embraced Amazon.com’s marketplace and now utilizes the website to not only sell The Planets – An HD Odyssey merchandise but other Houston Symphony recordings as well, allowing their products to reach beyond the Houston city limits.
Most importantly, other orchestras are taking notice. Houston is working with artist management company Opus 3 Artists to license the project to other orchestras. To date, thirteen orchestras have rented *The Planets – An HD Odyssey* and all have found sales to be beyond expectation. Opus 3 continues to receive inquiries about the project, and the number of bookings per year continues to increase.

**Funding and Financials**

At first, sponsors were reluctant to fund *The Planets* project because of the uncertainty and newness that surround the concept. The Houston Symphony development team had to use a whole new set of language that had not been paired with previous funding requests, including “HD,” “CD-ROM” and “film.” The team started out using storyboards and descriptions written by the director, but sponsors were still reluctant because these items did not convey effectively the scope of the project. Brandon VanWaeyenberghe, Houston’s Director of Corporate Relations, spoke about what it took to convince prospective sponsors:

> Everything changed once we received the first trailer for *The Planets*. For movies, a trailer motivates the potential audience by allowing them to experience the highlights of the film and seeing themselves in the theatre. The same thing happened when the trailer was presented to potential funders. Where before they could read about the images and score, they were not allowed to experience what the final project was going to be. (VanWaeyenberghe interview)
Armed with the trailer for the film, the Houston Symphony was able to secure 100% of the funds required to complete the project from both private sponsors and corporate sponsors such as Boeing and Linn Energy.

Other factors contributed to the fundraising success of *The Planets*. First, the project was guaranteed three Houston performances as part of the Symphony’s eighteen week subscription series. This ensured that at least 3,000 individuals would see the world première performances. “Solid ticket sales always help to bolster a project’s appeal to our potential funders,” VanWaeyenberghe mentioned. Second, there was a performance scheduled at Carnegie Hall the week following the premiere. Having this work performed at one of the world’s most respected venues was also a motivating factor for sponsors. The final and perhaps most important component of fundraising success was the close proximity of NASA. With the space program being an integral part of who Houston is as a city, funders saw this project as way to showcase local pride to the rest of the world.

The success of the film has contributed not only to the orchestra’s position in the industry as an innovator, but it has been a great revenue source. “The project definitely strengthened HS’s financial picture. Now, nearly three years later, we have more than recouped the out-of-pocket costs of creating the film product, and for the rest of the project's useful life we should enjoy an ongoing revenue stream from the film royalties and DVD sales,” explains Michael Pawson, the Houston Symphony’s Chief Financial Officer. (Pawson interview) As with any successful venture, there are sometimes unavoidable added costs. Houston has to be vigilant with equipment upkeep, and
technicians are now being contracted to help with the project as it travels around the world. Despite these added costs, Houston continues to profit financially and its reputation continues to grow thanks to The Planets – An HD Odyssey.

The Project’s Future Impact

The Planets – An HD Odyssey not only impacted the organization’s financial landscape, but it has created a multitude of opportunities for the Houston Symphony. The organization’s education department jumped at the chance to create a companion educational CD-ROM to give to local schools. The team collaborated once again with NASA to find lesson plans that focus on the subjects that can be experienced in the film. With further corporate support from Boeing, the Houston Symphony was able to distribute The Planets DVD and Education CD-ROM to all schools within the Houston Independent School District, as well as other area school districts.

On the heels of The Planets success, the organization decided to team up with Duncan Copp to create a sequel, The Earth – An HD Odyssey (formally known as Orbit – An HD Odyssey). This film features John Adams’s Short Ride in a Fast Machine and Richard Strauss’s Also Sprach Zarathustra. The first part of the film focuses on what it takes to get to space. Using images of past shuttle missions sets the stage for what is coming. Copp then takes the audience on a journey around our planet, weaving a magic narrative of what makes up its landscape. Critics and audiences alike loved the sequel,
and, as with *The Planets*, other orchestras are beginning to rent the film to use within their own seasons. Houston also has plans to produce *The Earth* as a DVD / Blu Ray and develop a companion education CD-ROM.

Houston continues to focus on multimedia projects, presenting films such as *West Side Story*, *Pirates of the Caribbean*, and *The Matrix* as the orchestra performs their soundtracks live. Ticket sales for these events are just as impressive as *The Planets – An HD Odyssey*. While some orchestras may be worried about being typecast as “that film orchestra”, Houston Symphony musicians seem to embrace the opportunities these projects afford them. Principal Tuba Dave Kirk describes the orchestra’s point of view best: “Anything that increases people's awareness of what we do as an orchestra helps us artistically.”
CHAPTER IV
DRAWING CONCLUSIONS

The Houston Symphony has created an innovative program that has bolstered their reputation and their bottom line. They are not the only orchestra to successfully launch a program that contributes to its big picture.

The Chicago Symphony – Beyond the Score

The Chicago Symphony Orchestra (CSO) launched *Beyond the Score* in 2005 as a Sunday afternoon concert offering. Chicago’s website describes it as an “in-depth, multi-media look at a single orchestral masterwork”. The program integrates visual art, literature, and theatre into the concert experience, giving the audience a greater knowledge of a composition’s historical context and insight into the music’s stories. The format is simple: during the first half of the concert, the orchestra presents a ‘live documentary’ featuring narration, slides, video, theatrical readings, film clips, and orchestral excerpts; the score is then played in its entirety for the second half. The *Beyond the Score* creative team, led by Gerald McBurney, has developed programs around works such as Vivaldi’s
Four Seasons, Stravinsky’s Rite of Spring, Beethoven’s Symphony No. 5, and Tchaikovsky’s Symphony No. 4, and they continue to develop new programs every year.

After its launch, Beyond the Score received high praise from Chicago critics, and the ticket sales grew with each new performance. The CSO discovered it was a program that appealed to both its core audience of “classical music aficionados” and new concertgoers who were unfamiliar with classical masterworks. Currently, Chicago presents Beyond the Score programs in a subscription offering. Similar to Houston’s Planets project, Chicago licenses their Beyond the Score programs to other orchestras for a fee. Orchestras that have presented the program include Philadelphia, Seattle, and Houston.

**Baltimore Symphony Orchestra – BSO Academy**

In 2010, the Baltimore Symphony opened its stage to Baltimore’s thriving amateur musician scene in a program called Rusty Musicians. The orchestra offered a side-by-side experience for these musicians, charging them a small fee to participate in a single BSO rehearsal. This gave the amateurs a rare opportunity to sit next to a professional musician and play a substantial piece of classical music. The response was overwhelming – over 400 people signed up in the first two days. The program’s success led to the creation of another program aimed at amateur musicians - the BSO Academy.
The Academy, funded by the Andrew W. Mellon Foundation through 2015, expands on the Rusty Musicians premise by offering a week of rehearsals, classes, and concerts with the orchestra to a select group of amateur musicians. Interested parties submit an application, but there is no formal audition process. If accepted, the amateur musician must pay approximately $1,900 tuition to participate. While some might find the tuition to be high, past participants did not have buyer’s remorse. 2010 participant Steve Harsch told the Baltimore Sun, "But I have enough money on hand to splurge on something like this…And if I didn't do it, I would look back and think, 'Darn, I should have paid the money.' So I just can't pass this up." (Smith) Not only does the experience give these amateur musicians an opportunity to live out what for many may be a lifelong dream, it also engages them with the Baltimore Symphony Orchestra in a deep and meaningful way. Baltimore hopes that this connection will lead participants to buy more tickets and make more donations in the future. After its first year, twenty of the forty-six Academy participants became donors.

While it is still unclear if the program will continue beyond 2015 when the Mellon grant expires, Baltimore has discovered a unique and successful program. Other orchestras have started to focus their efforts on creating similar programs for local amateur musicians. Baltimore has also received a large amount of media coverage for this program, putting their name in the forefront of national orchestral news.
Impact of Knight Foundation Study Findings

Whether or not it was done consciously, these symphony orchestras have implemented programs that exemplify the findings in the Knight Foundation’s study. These orchestras have endured the current trends in the industry by focusing on the keys the Foundation outlined: concert experience, community, concert innovation, and financial responsibility. The programs have become part of a solid foundation for these orchestras. Chicago exemplifies the Foundation’s findings regarding innovative concert experiences, and Baltimore proves the study’s points regarding community enrichment and continuing education.

Houston, in particular, has hit its stride in the years since introducing *The Planets—An HD Odyssey*. The project acted as a catalyst of positive growth toward sustainability. The orchestra is moving towards financial stability, with increased giving and contributions each year. The staff continues to focus on creating programs that appeal to Houston’s diverse community, and ticket sales prove their success. Touring has increased since 2010, and the orchestra’s newly appointed music director Andrés Orozco-Estrada wants that trend to continue. By focusing on its place within the community and creating an innovative program in a financially responsible way, Houston epitomizes what the Knight Foundation study discovered. Overall, when asked the question, does the Planets project ensure the Houston Symphony’s organizational sustainability, it is easy to see that this one project cannot be the sole foundation of the orchestra’s financial
picture. However the ripple effects of such a successful project can lead an orchestra down a path toward sustainability.

Other orchestras can find inspiration from Houston, Chicago, and Baltimore. These flourishing projects were born out of self evaluation and an internal call to increase their relevance within their communities and the orchestra industry. These three projects are unique to each orchestra, and the specifics of one program may not be the ideal for another orchestra. Orchestras who decide it is time to move beyond the typical concert formula would do well to look to the Knight Foundation’s findings to discover what might work best for them. These findings can spur self evaluation that will focus an orchestra in its quest for new programming innovations and ideas:

- Relevance within the community is paramount. What makes their community unique? Are there opportunities that can bolster the orchestra’s relevance within the community and, in tandem, with potential patrons?

- Orchestras must maintain strong bonds with its loyal patronage. What are some ways the orchestra can strengthen bonds with its current patrons? Can these ideas translate to opportunities for new patrons?

- Organizations must maintain financially sound strategies. Is it possible to develop a new program in a financially responsible way? Can potential funders for a new project offer more than just monetary support to ensure its success?
It may be difficult to begin the development process. Unlike other art forms, orchestras find themselves bound to the notes on the page, unable to manipulate sets or costumes or other items that can be changed thanks to ‘artistic license.’ Without the previously described self evaluation process, an organization can find itself paralyzed over the best course of action. It will never step away from its safe, repetitive method that it has relied on for years. The problem with this paralysis is that there is nothing new to gain from it. While they may find themselves in a comfortable position both within their community and financially, any number of problems, including those mentioned in Chapter 1, can easily knock them from their pedestal. Orchestras who become complacent run the risk of never achieving relevance and therefore have little chance at becoming sustainable. Developing new programs similar to Houston, Chicago, and Baltimore can greatly benefit an orchestra, acting as catalysts for the transformational change needed to move forward to sustainability.
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