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Culture Shock:
**The Merger of the
Rhode Island Philharmonic
Orchestra & Music School**



Culture Shock: **The Merger of the Rhode Island Philharmonic Orchestra & Music School**

Collaboration is inherent in the art of music making. Whether performing as a member of a chamber ensemble, premiering a new work by a living composer, teaching, or learning music, musicians are bred to work collaboratively. In the spirit of collaboration, should arts organizations with shared goals consider joining forces to improve efficiency and effectiveness? What are the benefits of large-scale collaborations and what are the best practices for a successful merger of two not-for-profit arts organizations with similar objectives? This case profiles the merger between the Rhode Island Philharmonic Orchestra (RIPO) and The Music School (TMS). Completed in 2000, the merger of the two organizations represents the first and largest successful merger of a professional orchestra with an existing community music school in the United States. After a look at the genesis of the merger, the early challenges, and the evolution of the new organization, you will be asked to identify ways to enhance collaboration between the divisions of the enterprise. For what reasons should two organizations consider a merger? What are the successes and missteps of the Rhode Island Philharmonic Orchestra & Music School merger? How might a new management team build a single healthy business from two related arts organizations?

RHODE ISLAND PHILHARMONIC ORCHESTRA & MUSIC SCHOOL

This case study was prepared by Eric Michael Laprade. Eastman case studies are developed solely as the basis for class discussion. Cases are not intended to serve as endorsements or sources of primary data nor are they to serve as illustrations of effective or ineffective leadership or decision making.

Background

The Rhode Island Philharmonic Orchestra & Music School (RIPOMS) is one of only a handful of musical arts organizations in the United States consisting of a professional orchestra and community music school managed together as a single enterprise. As the only professional symphony orchestra and the only comprehensive community music school in the state of Rhode Island, the organization is one of the primary sources of live orchestral music and community-based arts education in southern New England. The mission of the organization—“To enrich and transform Rhode Island and our region through great music performance and education”—places equal priority on education and performance.

Founded by conductor Francis Madeira, the Rhode Island Philharmonic Orchestra (RIPO) gave its inaugural concert in November 1944. It is the oldest continuously operating professional performing arts organization in the state. Early in its development, the organization considered music education as part of its core values, which led to the development of a youth orchestra program, annual education and family concerts, and in-school music performances. Now under the leadership of music director Larry Rachleff, the RIPO has developed into one of the finest regional orchestras in the nation. Guest artists have included such notable names as Renée Fleming, Itzhak Perlman, Yo-Yo Ma, Sir James Galway, and Isaac Stern. In 2000, the orchestra received national attention when it was selected via blind audition to perform at the conference of the League of American Orchestras.

Alan Fox founded The Music School (TMS), independent from the RIPO, in 1987. Fox had recently moved to Rhode Island and was surprised to find that the state lacked a community music school. He identified and hired faculty members, created a board of directors, and rented a facility for the school.

TMS quickly developed into a highly respected source of arts education in Rhode Island, offering private lessons and opportunities in chamber music and jazz ensembles. Since merging with the RIPO in 2000, the school has received national recognition. It serves over 1,600 students every week and maintains a faculty of over 70 teaching-artists. The school has been honored by the President’s Committee on the Arts and Humanities and is the recipient of a Creative Communities Award.

A Seed for the Merger

In 1998, the Rhode Island Philharmonic Orchestra’s board of directors began to chart a vision for what the orchestra would look like in the year 2020. A common thread in the discussions was a need for a robust and thriving education program. While the orchestra had a solid financial position and strong board governance, its audiences were aging and its storied youth orchestra program was struggling. To grow and strengthen the orchestra’s core, the board prioritized investment in music education programs and future supporters of classical music. Similarly, it committed to making classical music more accessible and more relevant to community members. Current RIPOMS board member and former RIPO board president Marie Langlois reflected on the board’s mindset leading up to the merger: “We were very concerned about the quality of experience that children were having in the youth orchestra. And I think we also felt that if kids didn’t have opportunity to learn about music and to play instruments,

According to the National Endowment for the Arts Survey of Public Participation in the Arts, from 1982 to 2008 the number of youth in America with access to arts education in their schools decreased from almost two-thirds to less than half.

Source: *Arts Education in America: What the Declines Mean for Arts Participation*. Compiled by Nick Rabin and E.C. Hedberg. National Endowment for the Arts. Office of Research and Analysis. Washington, D.C., 2011.

what was going to happen?” The concerns were amplified by the deteriorating state and decreased access to music education in the public schools of Rhode Island. The board felt a responsibility to support music education for the well-being of the orchestra and the region as a whole.

As the RIPO board struggled to enhance its educational offerings, The Music School’s board of directors grappled with a different set of business problems. TMS was searching for a permanent and appropriate teaching facility, and it further aimed to improve its finances in order to achieve a sustainable funding model. Inadequate space for instruction and a lack of capital threatened the school’s future. Bob Jaffe, president of the school, and John Curran, RIPO flautist and TMS faculty member, approached the RIPO board about the potential of a merger. While the school’s programming was strong and the quality of teaching was well respected, a precarious financial position brought the future of the school into question. The school in fact was facing nearly the exact opposite challenges of the orchestra. Whereas the orchestra had financial stability and was looking to strengthen its educational programs, TMS’s programs were flourishing in spite of financial instability. Despite the institutions’ distinct objectives, the two musical arts organizations were inherently linked by their mission of enhancing the region’s cultural landscape and offering robust music education programs. Several orchestra members already served on the faculty of TMS, further highlighting established interconnections. RIPO and TMS also shared board members and a pool of donors. It was the tenacity of Bob Jaffe and John Curran, however, that sparked the merger process and brought the idea closer to a workable reality.

As word of a proposed merger circulated in both organizations, a committee was formed to explore the details and plan for a new organization. The

committee, comprised of board members from each organization, met over the course of a year to finalize the details of the merger. When pressed on the difficulty of developing the merger plan, Langlois reiterated the logic of joining forces: “The good thing was that the orchestra desperately needed a more robust education program, and the music school desperately needed financial resources. Everyone agreed early on in the process that the merger was a good idea, so the task became just making it happen.” While personnel from both RIPO and TMS understood the ideals and vision of the merger, there was pushback from some stakeholders about the practicality and new financial model of a merged organization. Members of the orchestra administration were concerned about the increased complexity of the new business and believed it would be more than the staff and board could handle. Current executive director of the organization David Beauchesne highlighted the concerns that many RIPO board members and orchestra members had about the merger:

Nobody opposed the philosophy behind the merger. Nobody opposed the vision, the morality, or urgency of the decision. Everybody understood that. Even the people who were strongly opposed to the merger loved the vision, they just didn’t think it was practical and they didn’t think it would work from a financial perspective. The orchestra, in relation to its history, was at a point of relative strength. It had completed its first successful endowment campaign, and there were plans for another. And it was in a relatively stable position with good leadership at the artistic and administrative levels.

The RIPO was at a crossroads, and many believed the merger with TMS would expose the organization to substantial and unnecessary risk. At the

same time, the board and staff never questioned the need to address the organization's struggling youth orchestra program and to expand educational outreach programs. The question for the board came down to merging with TMS and assuming financial liabilities associated with the school, or developing their own music school that would immediately compete with the more established operation of TMS. According to Beauchesne, there were four main reasons that the board of the orchestra ultimately voted to approve the merger:

- The merger would enable both organizations to develop a more intimate relationship with community members of all ages by directly developing the musical capacities, participation habits, and values of young children and adults.
- The merger had the potential to create new opportunities for the orchestra and to attract more talented musicians.
- The merger would generate additional earned revenue sources through education programs that would assist with the organization's bottom line.
- The merger would address the decline of public school music education.

Day 1 of the Merger: The Real Work Begins

With a vote of approval from both boards and the merger documents signed, the orchestra and music school became a single organization in December 2000. The union of the two organizations represented only the second merger of a professional orchestra and a community music school in the United States. (The first merger took place in 1994 when the St. Louis Symphony joined with The Community Music School. The merger ended in 2001, when the Community Music School became

a part of Webster University.) While the alliance in Rhode Island was "complete" from a legal standpoint, the considerable work of integrating two different organizations with two different cultures—one focused on performance and the other on education—presented substantial and unanticipated challenges to the organization and its leadership. The most difficult and complex work of the merger would prove not to be the tasks leading up to the execution of the merger, but rather the cultivation of a new, unified culture and fresh vision for the organization, which equally supported both education and performance programs. Unlike corporate mergers, in which there are often intentional, profit-driven decisions about which culture is going to dominate in the merged institution, the RIPOMS board strove for a new culture that represented the beliefs and values of both the school and orchestra. Board members of the new organization quickly learned that a unified culture was not created by votes, signed legal documents, or press releases; significant work had to occur for the ideals and vision of the merger to be realized. For the new organization to flourish, the administration had to develop an environment that valued performance and education equally. How equal could the partners be in practice? Would the integration process be smoother if one culture dominates?

Mergers in the corporate world are relatively commonplace, and 2015 was a record year for them, with over \$4 trillion worth of mergers and acquisitions. In contrast, there are very few examples of successful mergers between non-profit arts organizations, the RIPOMS being the first merger of two arts organizations in the state of Rhode Island. While there is a body of research and established best practices geared for large corporate mergers, the merger between the RIPO and TMS more closely reveals issues faced by joining two small businesses. Given that TMS did not have a development or marketing team prior to the merger,

RIPO staff assumed the responsibility of marketing and fundraising for the school. Similarly, the majority of music school administration, including the president, were relegated to the school side of the merged organization, taking over responsibility for the RIPO youth orchestra. As Beauchesne pointed out, in the early years of the merger, increased expectations of staff members often were not accompanied by increased support and resources:

When people have a job that they go to every day, they tend to work based on what they know, and their experiences shape both their abilities and biases. There were people who were used to running orchestras, marketing orchestras, and fundraising for orchestras, who were being charged to also do these things for a community music school which had a very different business plan, different marketing issues, and a different fundraising model. Employees were being charged to do so with less resources and little, if any, training.

A unified operation was slow to materialize in the early years of the merger. Many employees had the prevailing mindset that they were wedded to either the orchestra side or the music school side of the organization—even if they had responsibilities to both sides. What was one institution on paper was still two separate organizations in reality. The two former enterprises were still steeped in their respective traditions, the orchestra representing the oldest arts organization in Rhode Island and the music school as the first of its kind in the state. One key factor that contributed to the divided mindset was the absence of leadership to promote a new organizational culture and shared mission. Despite being highly qualified, John Walsh, the executive director of the merged organization, who was hired in 2001, found merging the functions and cultures of the two entities challenging. Similar to almost all of the senior staff, Walsh had vast experience with orchestras,

and none with community music schools. He invested the most time and energy in the facet of the business with which he was most familiar. The infant years of the merged organization—the most crucial years, one could argue—were thus dominated by attention to administration of the orchestra, while the music school took a back seat. The institutional unevenness was further complicated by the fact that the school entered the partnership in a state of financial duress. Annette Mozzoni, Director of Education and Music School, reflected on the state of the organization's culture when she joined RIPOMS in 2005:

When I first arrived, the organization really wasn't merged. There was a single operational budget, but from a leadership standpoint, there were still a lot of challenges within the team. The school, while the finances improved, wasn't really in a position to be making any decisions. There wasn't yet a sense of a single mission or equal investment in both performance and education. There was still great work to be done to achieve true unification.

The fact that the senior administration was not successful in cultivating an integrated culture created a splintered environment that limited the organization's ability to function effectively and meet its mission in the early years of the merger.

Big Business Merger— Small Business Challenges

In practice, leadership and staff experienced obstacles in the early stages of the merger, which were underestimated by the merger committee. There was little, if any, funding available to support the cultural fusion that would prove so important for the organization. Leading up to the merger and during it, neither organization had the financial resources to commit outside consultants to identify and plan for the new organization's

culture. Following the formal merger process, no budget was slated for cultural development. Leaders incorrectly assumed that employees would automatically support the vision and mission of the new organization. Drawing on her background in corporate human resources, Mozzoni highlighted the barriers that arts organizations face in supporting cultural development:

It is very difficult in the non-profit arts world, where funding is always very tight, to address things like cultural development within the organization. In the corporate world, an organizational development specialist would have been hired to support the integration process. With limited resources and too many other pressing needs within the organization, this type of support just wasn't possible in the early days of the merger.

Given the size of the merged organization—only 23 administrative staff members—there was little flexibility with finding the right place for each employee to be effective. Some positions that appeared duplicative might require careful attention before collapsing in the new organizational chart. Beauchesne noted the staffing challenges that organizations face when merging:

One of the reasons that organizations merge is to achieve staffing efficiencies that in turn realize an economic benefit. Oftentimes, in doing so, certain capacities are lost that the organization ultimately needs to be successful. If you let go of the person who has expertise in marketing the school and only retain the person who has expertise in marketing the orchestra and you don't give them any increased resources—or in some cases, cut their budget to do both—that employee is not in a position to be effective, from a skill set, experience, mindset, and resource standpoint.

Although the organization was able to realize operating efficiencies as a result of the merger, a fractured culture and a lack of strong leadership meant that in the early years of the merger, the overall operational effectiveness was delayed. For example, the merger enabled the organization to reduce administrative expenses by more than 7% in the annual operating budget; however, the leaner operation did not allow rewards to be reaped immediately. In the first six years after the merger, the orchestra saw a 24% decrease in concert attendance, a precipitous decline attributed to a marketing department spread too thin to promote events adequately. While the organization had trimmed operating expenses, each department's effectiveness suffered due to a lack of support and training.

New Leadership: The Wheels Align

In 2006, David Beauchesne was hired as Director of Education and Community Partnerships. He replaced Katherine Lynch, a talented and highly respected leader, who left the merged organization amid frustration with the unmeshed culture and lack of equity between performance and education programs. Her departure was a signal to the board that they needed to find new executive leadership to integrate the vision of a single organization. In May 2008, after Walsh ended his tenure, Beauchesne was named the new Executive Director. The appointment of Beauchesne was controversial as he had little experience with the leadership of orchestras. However, with experience as both a performer and educator, he brought fresh

"When I arrived, the board was the most integrated part of the institution and the most progressive in its thinking about the integration. The board was willing to talk about the challenges facing both the orchestra and the school. They were very pragmatic and forward thinking."

**David Beauchesne,
RIPOMS Executive
Director**

perspective to the entire organization and had no obvious biases towards either facet of the organization. He recalled,

At the staff level, there was still a mentality of ‘different sides of the organization,’ and it took both time and conscious effort to shift the mindset. Despite the difficulties, there was still an overwhelmingly positive spirit coming from the board, and there were some very good things happening. I knew no matter what challenges the organization faced, that there was something to build from. It was a question of coming in and focusing on the positive kernels and the ideas and ideals that could drive the sides of the organization together. There was good work occurring, all the puzzle pieces just weren’t fitting together.

Beauchesne viewed his primary charge as the fulfillment of the board’s vision and the unification of the splintered organization. Prior to his arrival, an organizational chart had been developed to articulate roles in the new culture. The roles and job descriptions codified on paper were not embraced fully in daily activities. **Appendix 1** includes the RIPOMS’s current organizational structure chart, described by Beauchesne as an evolution of the structure that was present when he arrived. Only through a strong commitment to the ideals of the merger, the equal prioritization of performance and education, a focus on staff effectiveness, and the training of employees about the vision of the organization could an evolution of a corporate mindset and institutional pride occur. There was a realization that performance and education were two sides of the same coin; for the organization to be most effective at meeting the needs of the community, all facets of the enterprise had to flourish. To that end, in 2008 the organization officially changed its name to The Rhode Island Philharmonic Orchestra & Music School. Even after the merger,

the organization had maintained two separate names for marketing purposes—Rhode Island Philharmonic Orchestra and The Music School of the Rhode Island Philharmonic. With the shift to RIPOMS, the institution’s name finally reflected its partnership.

Adversity as a Source of Cultural Unification

With the merged organization only seven years old at the time, the financial crisis that began in late 2008—the largest economic collapse since the Great Depression—presented unprecedented challenges to the RIPOMS and its new leader, David Beauchesne. While the collapse took a toll on nearly all businesses, not-for-profit arts organizations were particularly hard hit. As consumers held on to disposable income, concert audiences declined, and participation in music school programs fared no better. Many donors saw their capacity to give disappear and likewise stayed on the sidelines. While the financial collapse had the potential to cripple the RIPOMS, the adversity that the organization faced had the effect of solidifying a unified culture for the enterprise. Whereas many arts organizations saw financial hurdles, the RIPOMS embraced an opportunity to become a stronger, more effective, and better integrated organization. The circumstances brought the entire organization together and further galvanized the performance and education components of the RIPOMS. Beauchesne detailed the impact the financial crisis had on the institution:

“It was an incredibly tumultuous time to engage in this type of work and all of the growth plans for the organization had to be called into question.”

David Beauchesne,
RIPOMS Executive
Director

We sized the impact of the financial collapse of 2008–09 on the RIPOMS budget at 26%. We agreed to reduce our expenses across the

board by 13%. It was about staying whole—the entire organization—it was about taking everything we had and making it 13% less expensive, instead of cutting programs. We reduced expenses first and then went to donors who still had the capacity to give, and asked them to give more. And, without exception, everyone did. They sacrificed to make up the remaining 13%. Everyone came together so we could continue to play an important role in the community.

In the darkest moments of the economic recession, the RIPOMS administration and board made a

“We didn’t want to cut programs and performances, and we didn’t want to do less for the community. We wanted to serve the community at the same level. So, the mission came first.”

**Annette Mozzoni,
RIPOMS Director
of Education and
Music School**

conscious decision not to cut any programming or performances, despite substantially decreased budgets. They contended that the needs of the community had not changed and that access to RIPOMS programs and performances were more important than ever. After the music

director and executive director agreed to a salary reduction, the entire administrative staff voluntarily agreed to reduced wages as well. Finally, management approached the orchestra’s union and the music school faculty.

A town-hall style meeting was held, which brought together the entire organization, including board members. Leaders put forward a compelling vision for emerging from the financial crisis, and the union and faculty voted to accept a decrease in pay. The success of the meeting and the union’s willingness to sacrifice for the greater good of the organization’s mission was attributed to the holistic approach that was taken; every single member of the organization was asked to sacrifice, the most symbolic being the

music director and executive director. Board member Marie Langlois, reflecting upon the meeting and the corporate willingness to sacrifice in support of the whole organization, recalled that “everyone shared the vision of moving forward and coming out of the financial collapse with success.” Annette Mozzoni agreed that the meeting “was a culturally unifying experience.” The organization’s commitment to reducing expenses with help from all of its levels brought donors off the sidelines. Langlois reflects, “the board and donors had to step up. If the staff was going to sacrifice, then board members and donors would have to give more.” The economic crisis of 2008, which threatened the existence of many arts organizations, allowed the RIPOMS to refocus its vision, align stakeholders, engage its donor base, and move towards a truly unified culture.

From Reactionary Work to Vision Work: The Strategic Business Plan of 2012

In 2011, the RIPOMS secured funding from the Kresge Foundation, Rhode Island Foundation, League of American Orchestras, and the MetLife Foundation to develop a strategic business plan. The foundational support enabled the RIPOMS to hire the consulting firm Technical Development Corporation (TDC) in the strategic planning process. Previous strategic planning documents of 2001 and 2006 were created internally. They were aspirational, but ultimately failed to identify strategies for growth based on data analyses. They did not fully investigate and understand the challenges and opportunities that the organization faced. TDC provided market and peer-institution research, data-driven analysis of the RIPOMS, and assistance with developing both realistic goals and a plan for implementing the goals. The strategic business plan, approved by the board of directors in 2012, was the first plan developed under Beauchesne’s leadership and in the wake of the financial collapse of 2008. The plan was also the first since the 2008 opening of the Carter

Center for Music Education and Performance, the organization's state-of-the-art music education facility and administrative offices. The Carter Center was the permanent teaching facility that the TMS had struggled to find prior to the merger with the RIPO.

The fifteen-member strategic planning committee, which met seventeen times from June 2011 to May 2012, comprised representatives from all areas of the organization, from board members and staff to orchestra players and music school faculty. Like the salary and wage reductions, the strategic business plan served as a significant unifying factor for the RIPOMS, with goals written for a diverse group of stakeholders. The plan identified three broad objectives for the organization:

- Maximize utilization and impact of existing Orchestra and Music School programs.
- Offer programs to all elementary schools in the state and region that help children learn and connect them to the Philharmonic.
- Attain a financial and operational structure that sustains the RIPOMS mission and vision, and supports the tradition of the organization as a national model for innovation.

At the surface level, each objective prioritized performance and education equally. Within each objective there were key goals with measurable outcomes for every part of the organization. For example, in order to maximize the utilization and impact of existing orchestra and music school programs (the first goal), the plan called for a 60% increase in Classical and Rush Hour series concert attendance and a 40% increase in music school teaching hours by the year 2017. The plan also engaged board members and the donor base

in realizing the mission of the organization by challenging them to help raise money to ensure that the goals, and their associated investments, were met. In addition to the equal prioritization of education and performance, the goals from the strategic plan created accountability throughout the entire enterprise. For example, in order to achieve a 60% increase in concert attendance and 40% increase in music school teaching hours, the marketing team was tasked with creating new five-year marketing plans for each initiative. Just as the goals encompassed performance and education, their realization required that each team member of the RIPOMS commit fully to the vision and ideals of a single organization. As a result, every member of the institution, whether a faculty member, board member, staff member, or an orchestra member, could point to successes for the part of the institution that they cared most about. Beauchesne highlighted the impact of the most recent strategic business plan:

We have institutional definitions of success that include everybody and that align with the organization's mission. They embrace everyone's vision for the institution, and all can see success. That wasn't true in the early stages of the merger.

Appendix 2 outlines the mission, vision, priorities, and values of the RIPOMS, as articulated in the 2012 strategic business plan. The equal investment in performance and education is apparent in both the mission and vision statements. Further, the section labeled "Priorities and Values" is explicit: "performance and education are equal priorities." The Community Impact and Service priority represents the synthesis of performance and education, articulating the ultimate social benefit of the merger: "We enhance the quality of life in our region in ways that are valued, relevant, and measurable, in a spirit of service and respect."

The Current State of the RIPOMS

The RIPOMS reaches over 125,000 audience members and students every year. The orchestra gives over 50 annual performances including the Classical Series, Rush Hour Series, Summer Pops, education concerts, and small group run-outs. There are plans to develop new programs, including annual pops, family concerts, broadcasts, and residencies in new markets. Audiences for the orchestra have grown consistently since 2008, with single-ticket sales growing 51% and the number of subscribers increasing 44%. The music school serves over 1,600 students each week, more than doubling its enrollment since the merger. Current programs include private instruction on over 30 instruments, Suzuki and early childhood programs, music theory, composition, piano and music technology classes, five youth orchestras, two wind ensembles, a jazz ensemble, chamber ensembles, jazz combos, and a community orchestra. The RIPOMS has partnered with over 170 community-based educational and artistic organizations, and through the “Flex with the Phil” program, the RIPOMS connects with 33% of elementary schools in Rhode Island. In the third year of the strategic business plan of 2012, participation in the orchestra’s education concert series, *Link Up*, has increased over 85%, Classical and Rush Hour series attendance has increased 42%, and music school teaching hours have grown 22%.

The organization’s home, the Carter Center for Music Education and Performance, is a 60,000-square-foot facility that houses the music school and administrative offices. The center is the realization of one of the initial goals of the merger: finding permanent and adequate teaching facilities for the school, and co-locating

those facilities with administration for the entire entity. Opened in 2008, the complex is the largest community music facility in New England and the recipient of multiple design awards. The facility includes two rehearsal/performance halls, 31 private teaching studios, two multi-purpose classrooms, a music therapy lab, a digital recording/composition and keyboard studio, and an early childhood, Suzuki, and music therapy wing. It also includes an administrative wing large enough to house the entire staff—school/orchestra, education/artistic/administrative. The facility allowed administrative staff to be grouped by function, not affiliation, and broke down physical barriers that had existed when the school and orchestra rented separate offices. It also brought the entire administration and board of the merged entity into proximity with the school for the first time.

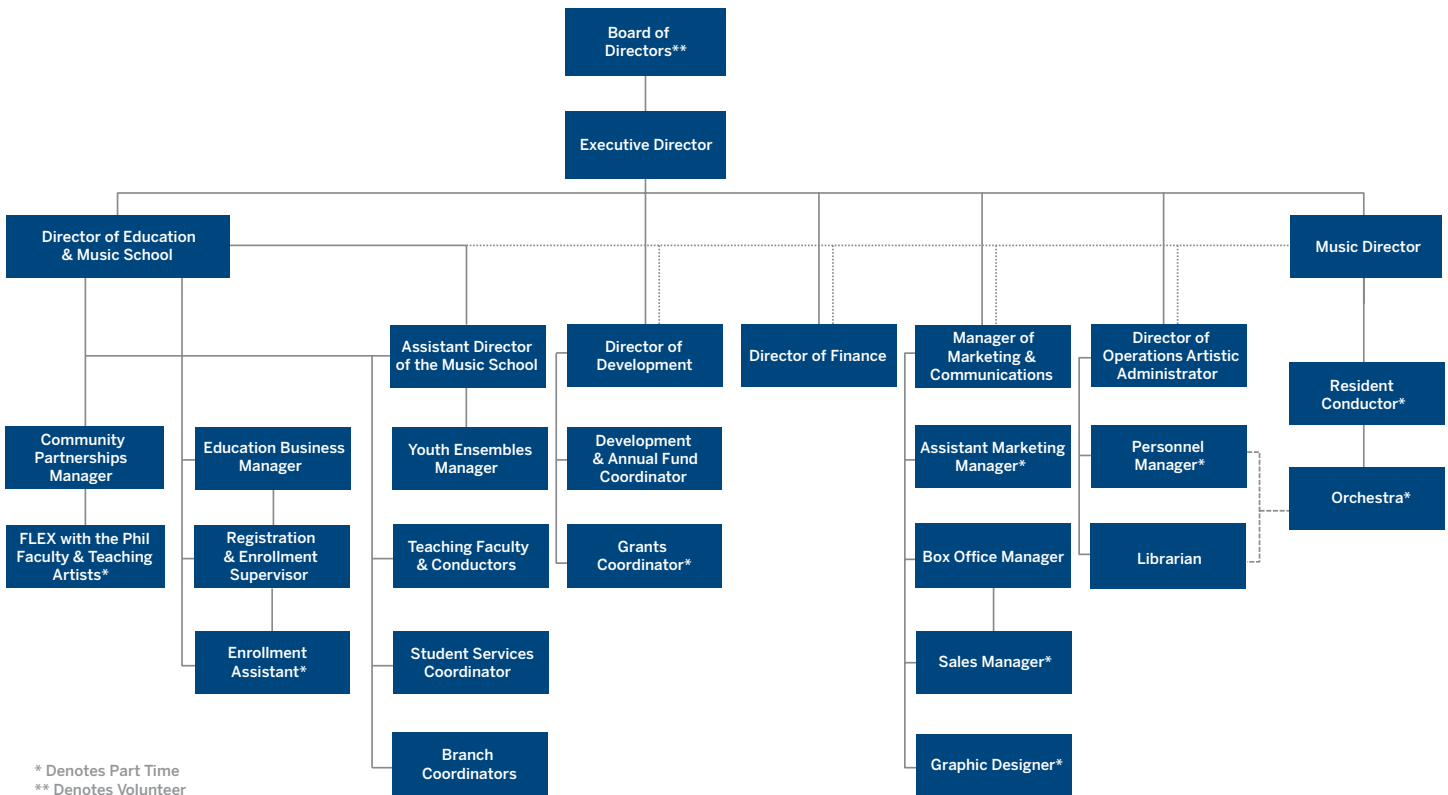
The RIPOMS is the largest employer of musicians in the region, with over 375 staff, musicians, and faculty on payroll. With an annual budget exceeding \$5 million, the organization generates more than \$10 million annually in economic activity for the region. Since 2012, earned revenue has increased by 13% and annual fund revenue has grown by over 25%, while budgets have remained balanced. Since 2008, the organization’s endowment has doubled, and it has raised over \$6 million towards its \$11 million Strategic Initiatives Campaign. On all fronts—programmatic, facility, financial, and leadership—the RIPOMS has achieved significant success in realizing the vision and ideals of the original merger proposal. The organization is a cultural beacon in Rhode Island, an innovative leader within the field, and an example of the artistic, educational, and operational benefits of large-scale collaboration among arts organizations.

While the RIPOMS has realized considerable benefits as a result of the merger, there is still ample opportunity for the organization to maximize the benefits of the merger. You have been hired by Executive Director David Beauchesne as a consultant for the RIPOMS. He has invited you to advise him on some issues and opportunities that have arisen in the RIPOMS partnership.

- In the 2012 strategic business plan study, TDC found that nearly 70% of music school participants attend at least one RIPO concert annually. In contrast, only 16% of orchestra-only patrons indicated they were interested in enrolling in music school programs. What recommendations would you make to Beauchesne for increasing public cross-participation in the RIPOMS offerings?
- One of the goals of the merger was to increase teaching opportunities for orchestra musicians and unique collaborative programs between the orchestra and school. Currently, 9 of the 73 orchestra musicians teach at the school. Joint programs between the orchestra and school include an annual side-by-side concert with the school's premiere youth orchestra and pre-concert lobby performances by music school students at RIPO concerts. The RIPO music director gives at least two master classes annually at the music school, adjudicates the music school concerto competition, and mentors youth orchestra conductors. What recommendations would you make to the organization for new programmatic initiatives that will further integrate orchestra and music school programs? From a programmatic standpoint, what does the future of the merged RIPOMS look like?
- In 2012, Beauchesne made a decision to participate in Carnegie Hall's *Link Up* program. *Link Up* features a twelve-unit preparatory curriculum for students and suggested music for educational concerts to be played by the RIPO. The program aligned philosophically with the education staff's vision for concerts that were artistically satisfying and contained an educational component. The program moved from an observation-based model to a participation-based model in which students performed on recorders with the orchestra for about three-quarters of the concert. Since subscribing to the Carnegie *Link Up* program, participation in Rhode Island has increased from 3,000 students to over 13,000 students annually, with plans for the program to expand to over 30,000. The program has also enabled the RIPOMS to develop close relationships with elementary music educators. *Link Up* has been popular with donors: over 75% of 2016 *Link Up* students participated for free, thanks to the support of patrons. Despite the popularity of *Link Up*, the artistic leadership of the RIPOMS and orchestra members voiced concerns about the dilution of the quality and value of classical music in the *Link Up* programming. The organization's goal to prioritize artistry and education equally had fallen out of balance again. How could leadership address concerns of the artistic side of *Link Up* while maintaining the success of the educational product?

APPENDIX 1

Rhode Island Philharmonic Orchestra & Music School Organizational Structure 6/1/16



APPENDIX 2

Rhode Island Philharmonic Orchestra & Music School Mission, Vision, Priorities, and Values

Mission

To enrich and transform Rhode Island and our region through great music performance and education.

Vision

The Rhode Island Philharmonic Orchestra & Music School is a national model for the 21st century symphony orchestra, providing performances and education programs that are of exceptional quality and are relevant and accessible.

Priorities and Values

We are a professional symphony orchestra with high aspirations for artistic excellence. We are also a community music school, with high aspirations for educational excellence. Performance and education are equal priorities. Actions around those priorities are guided by the following shared values:

Quality: Artistic excellence uplifts our community, and creates an aspirational model for all who seek meaning through music. Educational excellence helps those who seek to perform, compose or listen to music achieve their highest potential. Organizational excellence supports quality and sustainability.

Access: Quality programs must be accessible to have widespread community impact. We are committed to making our performances and educational programs accessible to all, regardless of ability, age, race, location, ethnicity, or socioeconomic status.

Diversity: We are committed to recruiting a diverse board and staff, offering low-price tickets, heavily discounted and free concert and education activities, generous financial aid, and collaborating with organizations that serve diverse populations.

Collaboration: We collaborate to further our mission efficiently and effectively. We work annually with more than 220 community partners, including schools, churches, community centers, social services, government agencies, and other arts organizations.

Community Impact and Service: We enhance the quality of life in our region in ways that are valued, relevant, and measurable, in a spirit of service and respect.

Sustainability: We are committed to stewarding our operations to permanently sustain our mission. This means focusing on programmatic and financial performance, balancing our budget annually, and having the resources necessary to grow, evolve, and change.

Innovation: Music is a creative field. We are committed to bringing that spirit of creativity to all aspects of our organization in order to grow and thrive in service of our community.



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