"The Search for Shining Eyes offers a compelling account of a 10-year experiment to rethink the relationship between symphony orchestras and their audiences. It challenges assumptions and dispels many myths about the fate of classical music. Without shirking from the problems, it offers a refreshingly optimistic view for the future. At its heart is a welcome open-mindedness about what a concert might be and how audiences might be found, engaged and developed."

Julian Johnson
St. Anne’s College, Oxford
Author, Who Needs Classical Music?

"Wolf has done an excellent job documenting and demystifying for the public at large just what foundations at their best can be about. It is rare to see the onion peeled back. For that reason alone it is an important contribution to our understanding of philanthropy."

Robert Crane
President, JEHT Foundation

"The Search for Shining Eyes is succinct, transparent in approach, nonapologetic and offers forceful ideas for consideration. The frank transmittal of information without sugar coating the strengths and weaknesses allows the reader to take a thoughtful and open approach to the ideas being conveyed. The summary and recommendations are valuable and thought-provoking. This kind of clear-eyed communication is essential as the summation of such important work taking place in the field."

Deborah R. Card
President, Chicago Symphony Orchestra Association
From 1994 to 2004 – a seminal decade for the arts in America – the John S. and James L. Knight Foundation invested $13 million in its Magic of Music Symphony Orchestra Initiative.* This commissioned history by Dr. Thomas Wolf offers not just a chronology of the program, it identifies significant lessons for funders and for orchestras. Those insights extend to other nonprofit arts organizations as well. The Search for Shining Eyes tries to reach beyond the Knight Foundation family and the small pool of orchestras that participated to capitalize on one of the most valuable roles foundations can play – to serve as a lasting laboratory for learning.

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Cover/opposite page: An audience at the Saratoga (N.Y.) Performing Arts Center listened to Stravinsky’s Symphony in E Flat, “The Firebird Suite.”

*The name “Magic of Music” is used with permission of The Magic of Music Inc., which creates special moments through music for thousands of critically/terminally ill and handicapped children and adults throughout the United States.
The Search for Shining Eyes

Audiences, Leadership and Change in the Symphony Orchestra Field

Dr. Thomas Wolf
Wolf, Keens & Company

September 2006
The Search for Shining Eyes

Table of Contents

Executive Summary 4
Part I. Background 8
Part II. Design and Redesign 12
Part III. The Program Begins 16
Part IV. The Initial Projects 20
Part V. Fresh Thinking 28
Part VI. Phase 2 in Action 36
Part VII. Lessons Learned 49
Sources and Acknowledgements 54

Opposite page: Audience members sat on stage and followed the score as the Saint Paul Chamber Orchestra rehearsed during a Musical U class in 1998.
“When I look out and see all those ‘shining eyes’ in the audience, I know we’ve created the magic.”
– Benjamin Zander, conductor and Magic of Music advisory committee member
Executive Summary

“The Search for Shining Eyes” provides a glimpse of the intersection of philanthropy and symphony orchestras by describing the history of the Magic of Music program – a funding initiative of the John S. and James L. Knight Foundation. The program dispensed more than $13 million from 1994 to 2004, a critical period for orchestras. After decades of growth, the field was experiencing financial crises that appeared to be symptomatic of larger problems. Knight’s program attempted to tackle those problems head-on.

As the Magic of Music was nearing completion, its designers requested that a history be written. They wanted a frank and open discussion of the crisis that the foundation hoped to address, the program’s success in doing so, and an enumeration of the lessons learned both for symphony orchestras and for philanthropy. To accomplish this, they offered unrestricted access to the foundation’s archives and to program participants.

The documentary literature on foundation grants programs is extensive, but most people are not familiar with it. Most of it is unavailable to the general public, and what is available does not make for very compelling reading to those whose business is not philanthropy. The challenge in this case was to produce something for a broader readership, not simply to add to the shelves of foundation archives.

This history offers a chronology of the Magic of Music program and briefly documents the individual grants and grantees. But its intent has been to identify what was most significant for funders and for orchestras and to provide insights for other nonprofit arts organizations as well. To be useful, this work has attempted to reach beyond the Knight Foundation family and the small pool of orchestras that benefited from its largesse to capitalize on one of the most valuable roles foundations can play – to serve as a laboratory for learning. Creed Black, the Knight Foundation president who launched Magic of Music, hoped that would be the program’s lasting legacy, which it has turned out to be.

The Magic of Music program’s impact on the field of orchestras was at once modest and significant. It was modest since it did not change the course of history for the orchestra field as some, perhaps naively, had hoped it would. It was significant because it was able to dispel long-held myths, foster new ways of doing business and point to promising innovations. It supported groundbreaking research, stimulated programmatic experimentation and encouraged other funders to explore change in the orchestra field. It supported symposia for field leaders, produced technical publications and fostered new forms of joint activity among orchestras. Knight Foundation leaders were not shy about sharing their opinions publicly nor were they reluctant to admit when they had made mistakes. The material on which this history is based is rich with their insights.

Why was the program undertaken in the first place? Knight Foundation – which
operates primarily in 26 communities across the United States – could no longer respond to the numerous requests for emergency funding to save local symphonies. Its staff believed, quite rightly as it turned out, that “save the symphony” campaigns tend to produce temporary results at best and are counterproductive at worst, unless they are accompanied by fundamental institutional change. Further, during the course of Magic of Music, the foundation learned that orchestras on the brink of financial disaster are not good candidates for financial assistance. Funding aimed at fostering transformational change during times of crisis will inevitably be diverted to short-term fixes. It also became clear that without strong unified leadership from all segments of an orchestra’s family – music director, musicians, board and executive leadership – change is unlikely. Such unified leadership becomes more difficult when organizations are under great stress.

Fifteen orchestras were supported during the course of the program, with the foundation providing planning and implementation grants, grants for research, and related technical assistance. The projects the orchestras carried out – intended to be transformational in nature – were mostly only marginally so, and some of the most significant outcomes were only indirectly associated with the projects that were initially funded. Some orchestras, realizing that their projects were not producing the results that had been hoped for, were able to shift midstream in order to explore truly promising and groundbreaking ideas. Others were able to restructure themselves internally in ways that fostered more meaningful participation from all segments of the organizational family, most especially musicians – a key requirement of institutional change. Still others contributed to the program primarily by serving as sites for national research.

Magic of Music was divided into two distinct phases. Phase 1 was based on 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. This so-called “shining eyes” theory suggested not only the program’s name (Magic of Music), but also the central idea that it was what happened in the concert hall – the choice and presentation of the music and the way that musicians (and music director) interacted with audiences – that would be most transformative. For a funder, this was an unorthodox idea and its serious exploration was unique. While the theory itself turned out to have been simplistic – other factors must come into play to change audience behavior – its serious study contributed greatly to an understanding of the orchestra-audience dynamic. In Phase 1, 12 orchestras received almost $6 million with the overall goal of strengthening the bond between musicians and audiences.

Phase 2 brought much greater rigor. The classical music consumer segmentation study, “How Americans Relate to Classical Music and Their Local Orchestras,” became its methodological basis. This research effort, funded by Knight, represented the largest discipline-specific study of arts consumers ever.
undertaken in the United States and involved more than 25,000 people in 15 distinct markets. It was augmented in Phase 2 by continued exploration of new ideas by orchestras working in consortia and it was accompanied by rigorous evaluation informed by additional data collection and analysis. Phase 2 also saw several Knight Foundation publications based on major topics that had been under examination during the years of the program – audience behavior, innovations in the concert hall, evaluation and others.

In the end, Knight Foundation’s legacy extends beyond the projects it funded and the research and publications it commissioned. Its legacy is in the systematic way it encouraged orchestras to test hypotheses about transformational change and the challenges it placed upon itself to learn from the successes and failures.

For orchestras, the lessons learned included the following:

➢ Despite predictions of the death of classical music and its audience, there is healthy support for the art form. The problems of orchestras stem not from the music they play but from the delivery systems they employ.

➢ An orchestra cannot be all things to all people. The mission of an orchestra needs to be clear, focused and achievable.

➢ Regardless of their aspirations for artistic excellence and prestige nationally and internationally, orchestras must be relevant and of service to their communities and to the people who live there if they hope to find the resources to survive.

➢ Transformational change in orchestras is dependent on the joint efforts of all sectors of the orchestra family – music director, musicians, administration, and volunteer leadership and trustees.

➢ Despite those who suggest a single magic bullet is adequate to address the serious problems that orchestras face, only a combination of many strategies will be effective.

➢ Free programming and outreach do not turn people into ticket buyers. They simply turn them into consumers of free programming.

➢ Traditional audience education efforts – targeted to the uninitiated – generally end up serving those who are most knowledgeable and most involved with orchestras.

➢ There is growing evidence that participatory music education – primarily instrumental lessons, ensemble and choral programs – will turn people into ticket buyers later in life.

➢ There is no evidence that exposure programs for children – especially the large concert format offerings for school children – will turn them into ticket buyers as adults.
➢ To grow their audiences, orchestras need to do more research on those who do not attend their concerts rather than focus on those who are already buying tickets.

The lessons for funders are equally compelling:

➢ To produce transformational change in a field, the dollars and time invested need to be commensurate with the scale of the field involved.

➢ Dollars are only a small part of what a committed funder can contribute to assist institutions and a field. Technical assistance, research, symposia and publications, among many other things, can also contribute significantly to program outcomes.

➢ Funders need to be clear with themselves and with applicants and grantees about the results they expect from a grants program even if this seems prescriptive. Vague instructions produce equally vague responses.

➢ Thoughtful programmatic innovation simply cannot happen when an institution is in the midst of financial crisis.

➢ Strategic change in grantee organizations cannot happen without strong consistent leadership. Turnover of staff and board will be a fundamental challenge to effectiveness.

➢ Sometimes the unintended results of a foundation program are more significant than those that were planned, and a funder should be open to them.

➢ If something matters to the success of a program, funders should not be afraid to take a hard line, even if this poses some difficulties for grantees. (In the case of Magic of Music, the involvement of music directors was crucial, yet to the program’s detriment, the foundation backed away from setting stiff requirements that would have inconvenienced the directors.)

➢ If a grants program is to be evaluated, it is best to think about evaluation from the very start and design the program in a way that makes uniform data collection and meaningful evaluation possible.

Today the challenges facing orchestras persist as they do for most nonprofit arts organizations. Magic of Music did not change that. Yet, since the inauguration of the program, the dialogue about those challenges has altered and the field seems better equipped to deal with them. Knight Foundation should take pride in the role it played in that change.
Part I
Background

A pessimist might suggest that Haydn wrote the main theme for this year’s [1988’s] orchestral season in his “Farewell” Symphony, in which one by one the musicians depart the stage. In a wave of excessively authentic performances, orchestras have either cut back seasons, suspended operations temporarily, or even closed down. According to a Louis Harris poll, the audience also is beginning to leave the hall, causing the first year of declining attendance after 15 years of growth.¹

At Knight Foundation

In 1990, Creed Black, the president of the John S. and James L. Knight Foundation, was sitting at his desk in Akron, Ohio, when he came across an article about symphony orchestras written by Frederick Starr, the president of Oberlin College. The article sparked his interest and attention. Over the previous several months, he had been growing perplexed about the problems of orchestras in the 26 communities where the foundation operated. Many had been making urgent requests for help. But as Black was learning, “saving symphonies” seemed to be a recurring and increasingly unrewarding effort. Rarely did emergency funding campaigns solve orchestra problems for long. In reading Starr’s words, spoken first at the American Symphony Orchestra League’s 1988 annual conference and reprinted later in its magazine, Creed Black was intrigued.

Starr had laid out a convincing case of what had gone wrong for orchestras in late 20th century America. Audiences were leaving the hall and not coming back. Budgets were out of balance despite the best efforts of newly professionalized marketing and development departments. Unionized musicians were growing increasingly restive and unhappy. All of these developments, Starr posited, came from a single fundamental truth – orchestras had stumbled and lost their way. They had forgotten that the magic of the music and the audience experience in the concert hall had always been the essential ingredient of success. Starr went on to say, “Americans all too rarely get an opportunity to take pleasure in classical music. Instead they are being separated from it by a wall of grim convention and self-conscious ritual having nothing to do with the music itself.”

After reviewing the long history of how orchestras gradually separated themselves from the very people they were supposed to be serving, Starr proposed solutions—most not terribly radical—for getting rid of the stuffiness associated with the concert-going experience. These included: revitalized programming, showcasing orchestra musicians and making them accessible to the public, offering more discussions about the music from the stage, offering flexible starting times and different length concerts. The only solution that may have raised some eyebrows was his suggestion that audience members should be encouraged to clap between movements if they felt like it, a practice not without precedent in the history of classical music.

Creed Black had many things to focus on in 1990 including moving the foundation from its first home in Akron to its present headquarters in Miami and

expanding the foundation staff. When he did eventually talk to Frederick Starr a year or so later, he floated an intriguing idea. What if Knight Foundation simply “adopted” a symphony orchestra in one of its communities and applied the Starr formula for success? Black discussed this idea not only with Starr but with his recently hired arts program director, Penelope McPhee. Together, the three agreed that the time was propitious to plan a major Knight initiative for symphony orchestras, whatever form it took.

Initial Research

Their first step was to commission research on what other funders had done for American symphony orchestras. In 1993, consultant John E. Graham undertook a literature review, describing national programs run by foundations, government and corporations. These were classified into:

➢ **Program grants** – to further artistic or institutional goals of orchestras such as expanded education programs or commissioning new works.

➢ **Challenge grants** – intended to leverage other financial support through the requirement of matching dollars from other donors or increased earned income.

➢ **Stabilization programs** – geared toward addressing chronic financial difficulties and balance-sheet stability (accumulated deficits, cash reserves, endowments). Examples include the Ford Foundation’s $60 million initiative to build the endowment of orchestras in the 1960s.

➢ **Technical assistance** – to aid orchestras with administrative or governance issues. Frequently this assistance came in the form of funding to hire adviser-consultants.

None of these models seemed fresh nor did they seem to promise fundamental change. Black, Starr and McPhee decided to convene and seek advice from a committee of field experts. Their desire was to find a way to encourage orchestras – preferably ones in Knight’s 26 communities – to produce “transformational change.” Since Knight Foundation was very much in an expansion mode in the early 1990s, with rapidly growing assets and staff, it was decided to bring on

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2Under Starr’s chairmanship, the committee included Judith Arron (executive director of Carnegie Hall), Wayne Brown (director of National Endowment for the Arts Music Program), Murray Horwitz (director of cultural programming for National Public Radio), Joseph Robinson (principal oboist with the New York Philharmonic), James Wolfensohn (CEO of The Kennedy Center), Benjamin Zander (music director of the Boston Philharmonic) and David Zinman (music director of the Baltimore Symphony). Since Wolfensohn’s tenure at The Kennedy Center was coming to an end, Larry Wilker, his replacement at the Center, took his place on the committee. David Zinman, despite the best of intentions, was never able to participate. Later, another conductor, Roger Niezenberg, was invited to join.
consulting assistance to ensure that the program received adequate attention. On June 6, 1994, Knight staff, committee members and consultants met for the first time in Washington, D.C.

In the Industry

Meanwhile in the orchestra industry, events were unfolding that would make the Knight funding program, when it finally rolled out, unique and courageous for its time. National foundations were retreating from their historic support for orchestras at least partly because the field itself was in turmoil and embroiled in controversy.

Starr’s 1988 address to the American Symphony Orchestra League conference had ushered in a chorus of voices urging a substantive re-examination of the field. By 1990, the league, the national service organization for orchestras, had taken up the challenge. One of the league’s initial forays was a two-year study of the financial condition of orchestras, conducted in 1990-1991. Based on its stark findings and hypotheses predicting a financial meltdown by 2000, the study was followed by a series of meetings in 1992 and 1993 involving scores of people attempting to look for solutions to symphony problems. The discussions and conclusions were gathered into a book entitled *Americanizing the American Orchestra*. The attendant hope was that by having gone through a period of research and self-examination, the orchestra field could now turn to the funding community to underwrite the testing of new ideas.

Controversy and Retreat

But the logical glide path from research to foundation funding hit a major snag. Media interest in the two publications, especially *Americanizing*, was intense and much of it was negative. A widespread feeling among influential field leaders was that orchestras would be fine if simply left alone. Some of the ideas that had been floated in the league publications were a particular anathema to leading music critics and writers, including The New York Times’ Edward Rothstein, whose views in several articles were picked up by others around the country virtually verbatim.

In the end, field leaders called a halt to the march toward change. The American Symphony Orchestra League retrenched, its longtime director resigned, and foundations, poised to explore and support change, decided it was time to look elsewhere. Indeed, by the time Knight Foundation launched its program, there was no other major foundation with a national funding program for orchestras. The foundation was well aware of this retrenchment and controversy when it undertook its new program for symphonies. Individual members of the committee were following national developments carefully and brought updates to the meetings. Under the circumstances, Knight’s board and staff deserves much credit for taking on a field in such turmoil when so many other foundations were fleeing from it.

3Dr. Thomas Wolf and William Keens had already assisted the Knight Foundation with another of its arts initiatives – the Museum Loan Network. They had also worked extensively with the orchestra field and had authored some publications for the American Symphony Orchestra League. Through their firm, Strategic Grantmaker Services (later Wolf, Keens & Company), they were brought on to assist with the administration and conceptualization of the program and remained with it until it came to an end more than a decade later in 2005.


In April 1999, a marquee in Portland told the story of the Oregon Symphony’s performance as part of its Nerve Endings series.
Mission and Mechanics

When the advisory committee for Knight Foundation’s as yet unnamed symphony program met for the first time on June 6, 1994, the staff and consultants were ready. An initial mission statement had been drafted that expressed the core concept:

*Providing venture capital to selected symphony orchestras to encourage them to undertake targeted entrepreneurial activities beyond the scope of their ongoing operations.*

Further, the mission statement identified three goals:

➢ 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.

Many of the concepts of the mission statement became pillars of the program. One was the idea that money should be used to undertake projects that would not ordinarily be within the orchestra’s financial capacity (enabling them to take risks). Another was the concept of identifying opportunities for systemic change. But committee members felt that the additional text was too broad. It talked about undertaking projects that would “strengthen the artistic, educational and organizational capacity of orchestras” or “enhance the role of symphony orchestras in their communities.” Many had seen grants for such grandiose purposes get absorbed into back-office operations with no real impact on what was occurring in the concert hall.

“Shining Eyes” and the Foundation’s New Ground

It was definitely the *concert hall experience* that Frederick Starr and the committee wanted to see rejuvenated. Committee members felt that orchestras should think about ways to generate more excitement in the concert hall and demonstrate more imagination through the musical experience itself. As advisory committee member and conductor Benjamin Zander said, “When I look out and see all those ‘shining eyes’ in the audience, I know we’ve created the magic.” Zander’s term – “shining eyes” – and the metaphor of creating magic led quickly to the program’s name – the Magic of Music.

Both the “shining eyes” concept and the program’s new name would ultimately have mixed impacts. Over time, the idea that changing the concert hall experience *in and of itself* was the key to reinvigorating any individual orchestra or the orchestra industry turned out to be naive. Too many other factors within the field, and more broadly in the larger society, were in play. But it remained useful as a starting point and it remains one of the hallmarks of Knight’s accomplishment.
The foundation had broken new ground. While other major funding programs for orchestras had focused on organizational infrastructure or institution building, only Knight's had concentrated so exclusively on the process of musical engagement and what went on in the concert hall. This would be one of the program's lasting legacies.

Proposed Mechanics

From philosophy, the group rapidly got down to details:

➢ The program would, at least initially, be directed at orchestras in Knight’s 26 communities.
➢ The foundation would invite orchestras to propose truly transformational ideas. Letters of invitation would avoid telling orchestras how and what to think or what the foundation wanted to hear. By being so open, it was hoped, more visionary ideas would come forward.
➢ By December 1994, the foundation would award small seed grants that would allow several orchestras with promising projects to take good ideas to the next stage, fleshing them out and developing them a bit further.
➢ By April of 1995, orchestras could apply for substantial three-year implementation grants to take their ideas through the next stages of development. The committee anticipated perhaps six projects in all.

The First Request for Proposals

It did not take long for the staff of the foundation to go into action. On July 27, 1994, letters were sent to orchestras in Knight communities asking for proposals to the Magic of Music program. The three-page letter reflected the committee's philosophy and approach. It emphasized the importance of musical presentation and performance and de-emphasized management and financial issues:

… the committee agreed unanimously that Knight Foundation’s initiative should encourage orchestras to think above all of the appeal and excitement of the programming, presentation and actual performance. We begin with the blunt truth that, in the end, an orchestra’s success flows not from its organization and infrastructure but from the music itself. Committed and passionate performances before enthusiastic and informed audiences are the very essence of the orchestral experience. Careful budgets, efficient management and good marketing may all be means to that end, but they are not the end itself.

The foundation invited people to “re-imagine your orchestra” and to share ideas “on how to intensify and deepen your audience’s experience of orchestral music.” “Our goal,” the letter said, “is to reach beyond business as usual” and to “enable you to experiment.” Orchestras were invited to send in a two- to three-page letter by Sept. 30, 1994, describing how they would use as much as $50,000.

Initial Disappointment

If the staff and committee were hoping for visionary ideas from the orchestras, they were in for a major disappointment. Twenty proposals were received coming from orchestras of varying sizes. Virtually all seemed to reflect the very “business as usual” that the letter had stated was inappropriate. Such was the opinion of the
advisory committee when the proposals were reviewed on Oct. 30, 1994. Part of the problem may have been that the Knight letters were sent during the summer when key individuals were away. Letters in most cases had been routed directly to development offices where the invitations to apply received relatively formulaic treatment.

It was apparent that a few orchestra executive directors were involved in developing the proposals but there was no evidence of input from music directors or musicians. This seemed surprising given the orientation of the program focus on the concert hall experience. But as became apparent with the program’s subsequent development, the internal procedures and structures of most orchestras did not actually foster input from musicians and such input was the exception rather than the rule. Nor was there any indication that anyone on any board had been informed of the opportunity. Clearly nothing transformational was going to emanate from these proposals.

In retrospect, the foundation did bear significant responsibility for the unexciting proposals. In attempting to avoid sounding prescriptive, its letter had given virtually no guidance. The hope was that great ideas were simply poised to spring up from within the organizations and that the foundation’s role was to keep out of the way. But without more clarity about expectations, the foundation’s letter created confusion about expectations. This turned out to be an important lesson, and from then on (and for the next 10 years), the foundation made itself very clear.

Back to the Drawing Board

Thus, it was back to the drawing board with the committee. A new approach was proposed:

➢ Select a few of the proposals/orchestras for possible resubmission with clear responses about why they fell short and expectations for future submissions.
➢ Select a new group of orchestras (beyond those in the 26 Knight communities) where there was already some indication of innovation and invite these orchestras to apply.
➢ Draft a new letter with more clarity about:
  ➢ Desired results (getting audiences back into concert halls, enlivening the concert hall experience)
  ➢ Process (having leadership involved in developing the proposals)
  ➢ The intended use of the funding (venture capital for transformational ideas, not merely enhancements or add-ons to what was already going on).
➢ Require orchestras that received an initial planning grant to come to a multiday retreat to discuss their projects and the foundation’s overall goals for the program.

Committee members were asked to nominate orchestras outside of the Knight communities that held promise of providing innovative projects, and 17 orchestras were added to the pool.
Hugh Wolff rehearsed the Saint Paul Chamber Orchestra in 1998 as students in the adult education series, Musical U, followed the score on stage.
Part III

The Program Begins

Learning from Experience

Having learned from the first request for proposals that orchestras needed more guidance, the foundation sent revised letters of invitation to 30 orchestras on Dec. 7, 1994. These included a detailed attachment explaining the program's goals and the proposal requirements. Applicants were asked, among other things, to describe their project concepts in detail, justify the need for funds, discuss potential impact on the orchestra field, and delineate the financial and human resources the orchestras themselves would devote to the projects.

Two features of the application process were unusual:

➢ First, the orchestra was required to include a statement about how all segments of the orchestra family would be involved. In addition, because Knight was seeking institution-wide commitment, the proposal had to be signed by the chief executive, the music director, the board chairman and a musician.
➢ Second, all proposals had to contain the following statement: "If selected for a planning grant, one representative each from our senior management, artistic staff, board and musicians agrees to attend a retreat to discuss our project on May 14-15, 1995 …"

In the end, on Dec. 7, 1994, 10 of the 20 orchestras in Knight communities that had originally submitted proposals were invited to resubmit (three would secure funding). 6 Seventeen new orchestras (not in Knight communities) nominated by committee members also received invitations (nine secured funding). 7

The Proposals and the Initial Planning Grants

From the second request for proposals, 25 orchestras proposed projects. They represented a range of activities that seemed, at least on paper, to be far more innovative and imaginative than those that had been offered earlier. Highlights of the proposals included:

➢ Technological enhancements to the concert such as video screens to show the musicians and conductor (Philadelphia Orchestra) or to provide educational enhancements (Saint Paul Chamber Orchestra).
➢ Technological approaches to reach new audience prospects (Charlotte Symphony and Kansas City Symphony).
➢ Audience development among the young (Boston Symphony), culturally specific groups (St. Louis) and young professionals (Colorado).
➢ Changes in the content and format of concert programs (Oregon Symphony) in order to provide compelling programs for new and different audiences.
➢ The provision of contextual information in the concert hall (New World Symphony) and at informal educational events before and after the concert (Brooklyn).

6The funded orchestras in Knight Foundation communities included the New World Symphony (Miami), Philadelphia and Saint Paul. All would ultimately receive funding both for planning and implementation and stay with the program until it ended in 2005.
7These included orchestras in Boston, Brooklyn, Colorado, Kansas City, Los Angeles, Louisiana, Oregon, Saint Louis and San Antonio. Boston and Los Angeles received planning grants only and were then dropped from the program. The other seven received both planning and implementation grants. Six of them would remain with the program until its end in 2005 (the exception was San Antonio, which was dropped midway through the program when its financial problems became so severe it could not continue).
Using a composer to teach young people about the experience of making music (Los Angeles).
The development of a participatory and interactive concert experience (San Antonio).

Of the 12 orchestras whose projects are mentioned above, all were ultimately funded for planning by Knight though it took some longer than others to submit proposals that the foundation felt were fundable.

Convening the Orchestras

The committee and staff had felt that if the program were to be successful, the relationship between the foundation and the grantees had to be a collaborative one. To begin the dialogue, the foundation set up a two-and-a-half day retreat for grantees, foundation staff and committee members at the Aspen Institute’s Wye Center in Queenstown, Md., on May 13-15, 1995. The purpose of the meeting was:

- For Knight Foundation, to provide background on its rationale and aspirations for the program.
- For the committee, to provide its perspectives on the program design and what success might look like.
- For the grantees, to discuss their projects and the challenges they faced.
- For Knight staff and consultants, to discuss the next phase of the program – implementation grants – and to explain the application process.

The Wye retreat was considered a major success by the participants and similar convenings became a feature of the program as it moved forward. Altogether, seven retreats were held during the course of the program, and they represent one of its major achievements. They combined lively interaction among participants, lectures and discussions with experts from within and outside the orchestra field, and reviews of the progress of the orchestras’ projects and of the program as a whole. Invitees included each orchestra’s music director, executive director, a trustee and a musician. Later, in 2001, marketing directors were invited.

Absent Music Directors

At the Wye retreat, music directors were largely absent. Yet everyone acknowledged that it would be difficult to bring about major institutional change without their participation. There was little evidence that any music directors had been centrally involved in the planning for the Knight projects or the proposal development process. One explanation for their lack of attendance was that their schedules were planned so far in advance that getting their attention or participation required more lead time. Everyone hoped that the situation would improve during the course of the program.
Despite much discussion of the topic of music directors during the many years of the program, little progress was made. Music directors, for the most part, took little or no interest in the projects. In looking back, this is one area where Knight staff felt that the foundation could and should have taken a harder line. Knight might have made music directors’ involvement (including attendance at the retreats) a condition of funding. Instead, because most music directors (with notable exceptions) continued to be remote from the program, projects rarely ended up reaching deep into the fabric of orchestras’ artistic operations.

The Tanglewood Summit
In the summer of 2002, about eight years after the beginning of Magic of Music and well after it became clear that music directors were not going to participate fully, the Boston Symphony Orchestra (BSO) proposed a retreat at its summer home, the Tanglewood Music Center, on the topic of the role of music directors in the 21st century orchestra. Though the BSO was no longer a Magic of Music orchestra, the Knight Foundation staff felt that it would make an ideal host and agreed to help fund the discussion so long as Magic of Music orchestra representatives, including music directors, attended.

What became clear over the two days of discussions was just how much the involvement of music directors would be required if there was to be true institutional change – especially change involving what transpired in the concert hall. It was the music director who made programming decisions, and his or her approval was essential regarding what innovations would or would not be permitted on stage. Time spent outside of the concert hall was limited to whatever he or she was willing to give. For music directors of smaller orchestras, there were already encouraging signs. Several in attendance were committed to outreach and serving the local community. But such involvement in other cases seemed to depend on fundamental shifts in attitude and in training. For larger orchestras, the challenge would be particularly great inasmuch as their music directors were generally jet-setting superstars on the international scene who were often uninterested and unwilling to take time out of their schedules for events deemed of lesser importance.

The Eschenbach-Tilson Thomas Symposium
Given this state of affairs, it was decided that at the final retreat in January 2005, two of the most important of the program’s music directors should participate in a discussion. Christoph Eschenbach of the Philadelphia Orchestra and Michael Tilson Thomas of the New World Symphony and San Francisco Symphony discussed the role of the music director in institutional change. A DVD of that session is contained in the Knight Foundation archives. While the session was general in nature and no major new ground was broken, the opportunity for a genuine discussion among the artistic leaders of major orchestral institutions was itself a major step forward. Sadly, it came too late to have substantial impact.

New World Symphony music director Michael Tilson Thomas, looming over the stage, spoke via Internet2 technology at the Magic of Music retreat in Miami Beach in January 2005.
Over the first five years of the Magic of Music program (1994-1999), Knight Foundation provided some $5.4 million in grants supporting innovative, multi-year projects in 10 orchestras. With the completion of the planning phase of the projects, the first implementation grants (most for three-year projects) were funded in 1996 with the balance over the next two years.

Ambitious Projects, Mixed Results

All of the projects aimed at transformational change. Certainly none achieved such change in three years, though some projects looked promising toward the end. A summary of the projects and the results follows:

➢ Brooklyn Philharmonic ($500,000 in 1996 over three years) – The Knight Foundation grant funded the expansion of innovative thematic programming, which had been developed by its imaginative executive director, Joseph Horowitz, in conjunction with music director Robert Spano. To explore the themes of these concerts more fully, the philharmonic proposed developing weekend-long series of ancillary educational events – called Interplays – that would link to the content of the formal concerts. Some of the thematic program ideas were also designed to be shared with local public schools.

Results: The thematic concerts themselves were deemed so interesting and successful that they were picked up by other orchestras including the Chicago Symphony. However, the three-year project was not pursued in the next phase of Magic of Music. Part of the reason was the departure of Horowitz (who had designed the program) and part was the fact that the Interplays never seemed to link well with the thematic concerts as an audience-building tool. In the second phase of Magic of Music, the philharmonic redesigned its project so that it could more explicitly serve new audiences.

➢ New World Symphony ($800,000 in 1996 over three years) – This unique training orchestra consisting of conservatory-trained young musicians wished to provide opportunities for its players to develop nonmusical skills essential to effective communication with audiences. At the same time, the grant helped the orchestra explore new uses of technology and incorporate them into innovative concert experiences.

Results: This was one of the most successful Phase 1 projects. The nonmusical development of musicians proved to be indispensable to their training, and the technological innovation that was explored included extensive use of ultra-high-speed Internet2 technology in teaching and programming. The project was carried forward into Phase 2 of the program three years later. It was significant that one of the most successful projects took place in an orchestra that was made up of young players who seemed open to change.

➢ Oregon Symphony Orchestra ($550,000 in 1996 over two years and $250,000 in 1997 for an additional year) – In order to attract a new demographic to the
The Oregon Symphony proposed an innovative concert series called Nerve Endings which combined symphonic music, story lines, video and, in some cases, other musical genres (including pop).

**Results:** The innovative concerts added a fresh and imaginative programming element to the orchestra's offerings and did attract new audience members to the concert hall, including the younger demographic that was targeted. As an example, its Mozart to Midnight played to a sell-out audience of 2,700, 38 percent of whom were under 40. The project was carried forward into Phase 2 and several other orchestras borrowed some of the concert ideas for their own audiences and halls.

- **Philadelphia Orchestra ($104,740 in 1996 for one year and $30,000 in 1999 for one year)** – This world-class orchestra – one of the so-called “big five” – proposed a test of video screens as an audience enhancement to some of the concerts in its regular hall and summer venue.

  **Results:** So negative was the initial reaction to the video screens from some of the orchestra's core audience members that the project was abandoned and the balance of the grant was used for other purposes, especially fostering internal communication among members of the orchestra family (supplemented with another $30,000 grant). The orchestra was not funded for a project in Phase 2 of Magic of Music. However, the redirected funding had tremendously positive consequences for the orchestra, which had undergone a long and bitter strike. As a result of the development of better communication models, Philadelphia instituted many key roles for musicians and forged a groundbreaking agreement on how to produce, market and pay for orchestra recordings.

- **Saint Louis Symphony ($750,000 in 1996 over three years)** – The Saint Louis Symphony came into Magic of Music having piloted an innovative agreement with its musicians that allowed the trading of orchestra services in the concert hall for services that musicians would perform in the community, often in small groups. The foundation funded a number of these community-based initiatives, aimed at strengthening the musician-audience relationship and encouraging new ticket buyers.

  **Results:** The community programs were deemed successful as an audience-outreach endeavor though they did not result in a substantial increase in the ticket-buying public. Nevertheless, with an added provision to the musicians’ collective bargaining agreement allowing them to use up to three weeks of their services for community activity, this became one of the projects that was continued into Phase 2 and was developed in new ways by other orchestras.

- **Symphony Society of San Antonio ($600,000 in 1996 over three years)** – This orchestra had originally been rejected for funding by the advisory panel, but a vigorous advocate among the advisers persuaded his colleagues to change their
minds. This was unfortunate. The orchestra was constantly in crisis (ultimately it ceased operations for a time) and efforts to expand its Casual Classics series were overshadowed by a more basic need to cover orchestra salaries and cash-flow needs.

Results: Despite the best efforts of the foundation to monitor the uses of the funds and ensure that matching monies were secured, the project was deemed unsuccessful and the orchestra was dropped from further consideration for project support after the three years.

> Kansas City Symphony ($300,000 in 1998 over two years) – At the time that the Kansas City Symphony was originally considered for inclusion in the Magic of Music program, it was the only orchestra of its size that was unaffiliated with the American Federation of Musicians. This was by the design of its original underwriters, who had provided $10 million to restart an orchestra after the demise of the Kansas City Philharmonic. The question was whether such independence might give Kansas City more leeway to try something truly innovative. It proposed a project called Concert Connections, a musician-driven effort to invigorate the concert experience and encourage new audiences to become regular concertgoers.

Results: For the most part, nothing particularly noteworthy resulted directly from this project and the orchestra ended up affiliating with the AFM during the ensuing years, making the experimental question of a so-called “nonunion orchestra” moot. What was most significant about the Kansas City Symphony’s project, however, was an indirect result. It provided essential information that would later be used in developing one of the most radical concepts to come out of Magic of Music: the so-called Concert Companion. Concert Companion (or CoCo) was a hand-held computerized device that provided simultaneous program notes for audience members who wanted to understand more fully what they were listening to.

> Louisiana Philharmonic Orchestra ($400,000 in 1998 over three years) – Like Kansas City, Louisiana was invited into the program because it had an unusual structure. After the demise of the New Orleans Symphony, local musicians had come together to form the Louisiana Philharmonic. It was in most respects a musician-owned and -operated orchestra, certainly one where the general structure of a lay board and professional staff was not present. The question again was whether this would make a difference in the success of a truly transformational project. Louisiana proposed Connections, a multidimensional project to enhance connections between musicians and audiences, the orchestra family and the New Orleans community.

Result: Like Kansas City, an alternative organizational structure did little to differentiate this orchestra from its peers in carrying out an innovative project. Beset by financial challenges, the orchestra’s ability to initiate major activities was limited. On the other hand, the group did begin to identify ways it could start
reaching out to new audiences, especially African Americans, and by the time it proposed a project for Phase 2, it was well on its way to a significant project design.

➢ Saint Paul Chamber Orchestra ($220,000 in 1998 over three years) – Saint Paul’s original planning grant had been for testing of a new concert product that included adding performance elements such as theater, literature, video, works of art and conversation to a musical performance. More time and refinement were required and so a second planning grant was given to focus on a single musical masterpiece, adding several extra-musical elements. In the end, the project was abandoned, and the orchestra proposed an educational initiative called Musical U – a series of evening classes conceptually tied to the orchestra’s regular concert series that focused on symphonic music, composers, conductors and musicians. Its intent was to attract less informed people who were not regular concertgoers to the concert hall.

Results: Musical U seemed to offer promise and it was one of those projects that was continued into Phase 2 of Magic of Music. While it was popular with audiences, it proved unsuccessful in luring significant numbers of new people to concerts.

The 10th orchestra to be funded during these years struggled to find an appropriate project. It was kept in the pool with a second planning grant in hopes that it could pilot some project ideas and apply for an implementation grant later:

➢ Colorado Symphony Association – Like Kansas City and Louisiana, Colorado had initially been invited to apply because of its unusual structure. As an orchestra that had been formed by musicians after its predecessor orchestra – the Denver Symphony – had gone bankrupt, it was still largely governed by musicians. Again, the question was whether the unusual structure would result in a more radical or transformational project.

Result: In fact, Colorado’s structure may have been a contributing factor in its not being able to complete a planning project and get a project approved during these years. There was no one with the authority to take the lead in pulling things together and there was turnover in responsibility. Colorado first proposed Explore the Music!, a project focusing on outreach, interactive multimedia and a survey of community cultural needs. The results were sufficiently unimpressive that the advisory committee suggested further planning and testing. It was not until Phase 2 (and with some assistance from other orchestras) that Colorado came forward with a fundable project.

Overall, the impact of these projects ranged widely, though the foundation was anxious to see the results of an external evaluation before making up its mind on their success and the success of the program overall. The initial impression was that significant change would take time – certainly more than three years – and that it would require adjustments in the internal culture of many orchestras.
Initial Assessment and Lessons

By September 1999, the staff of Knight Foundation could report to the foundation’s planning committee what the evaluation had revealed. On the positive side, Magic of Music orchestras had in certain cases:

➢ Attracted new concert audiences.
➢ Strengthened their artistic and organizational identity.
➢ Challenged programmatic “business as usual.”
➢ Fostered a more collaborative organizational culture within orchestras where collective bargaining and stressful union-management interaction had produced distrust and strife.
➢ Encouraged the development of new forms of training for musicians – in presentation and communication – to support lifelong learning and artistic development.

Dispelling Myths

Just as valuable as the positive accomplishments of orchestras were the myths that were being challenged. From the experiences of the participants and information gleaned from the evaluation, a more nuanced picture was emerging of the challenges orchestras faced:

1 Outstanding music and the memorable performance of it is not, by itself, sufficient to develop large numbers of new audience members. The Magic of Music posited the “shining eyes” theory that excitement in the concert hall would be transformational to audience behavior. But in the end, it was clear that this was simplistic – other elements must be combined with artistic factors.

2 New audiences can be attracted to orchestra programs using various methods tested. There is not yet evidence, however, that significant numbers of them can be retained without more sustained follow-up strategies. The so-called transfer theory was still unproven and perhaps unprovable.

3 Audience development efforts often provide the most benefit to existing concertgoers. The challenge in allocating audience development resources thus becomes how to balance the need to retain current audiences with the desire to attract new ones.

4 Orchestras with unusual and alternative structures behave in most respects like ones with traditional structures. The question here was: Would organizations that were either musician-run or unaffiliated with unions be in a better position to pull off major institutional change of the kind desired through Magic of
Music? There was no evidence of any difference between these orchestras and traditional ones.

5 Orchestras do not have proper tools to accomplish the necessary measurements and research that will reveal detailed audience trends over time and the associated understanding of the motivational drivers of audience behavior.

6 It can be challenging to develop new programs to attract new audiences without alienating core audiences. Since core audiences provide the bulk of earned and contributed revenue, it is crucial to continue serving their needs and desires.

7 Serious audience development requires changes in core institutional attitudes, thinking and behavior in all aspects of the operations of orchestras. It is not simply a question of better marketing to find more people to consume the same product in the same way. The changes required are more fundamental.

8 Supplementary programs occurring outside the concert hall can be effective in enhancing the concert hall experience – especially for the less frequent concertgoer. These events can be explicitly educational or they can be less formal meet-and-greet or even social in nature.

9 Sharing of ideas among orchestras is critical to the development of the field. As more orchestras test new ideas, other institutions gain the confidence to do so.

10 Finally, field learning is more likely where there is some consistency among orchestras in how they approach evaluation. A review of the evaluation results indicated that the effort to customize the initiative to each orchestra's local needs involved a trade-off. In encouraging each orchestra to design its own program and develop its own evaluation methodology, what was gained in flexibility was offset by the loss of quality and comparability in the disparate evaluation efforts.

By September 1999, the staff of Knight Foundation could report to the foundation's planning committee what the evaluation had revealed.

Obviously many valuable lessons had been learned through Magic of Music. In spite of the fact that much of it indicated that transformational change in orchestras was going to be far more challenging than people had hoped, the staff of the foundation was encouraged. They wanted to move ahead. But clearly any continuation of the program would require a major redesign.
Evaluation

In 1995, Knight Foundation commissioned an external evaluation of Magic of Music from Bay Group, a consulting firm in San Francisco. The fundamental purpose was to test Knight’s underlying hypothesis that a carefully designed program of support and related technical assistance could effect transformational, systemic change in the operation of symphony orchestras. In particular, the evaluation was to look at whether the program altered fundamentally the experience in the concert hall and revitalized the relationship between orchestra musicians and audiences.

The design of the evaluation was ambitious:

➢ It proposed looking at program design, implementation, outcomes and impact, and commenting on all of them.

➢ It promised to evaluate activities within each orchestra as well as to assess them across all the orchestras in the program.

➢ It was to determine the extent to which the participants’ projects were genuinely new explorations for orchestras or simply further development of existing activities.

➢ It was to consider how the work that orchestras were doing was getting integrated into the fabric of their institutions.

➢ Finally, it was to assess whether a demonstration project of this type involving a small selection of the field of orchestras could effect systemic change across the whole field.

The evaluation was hampered by a number of factors that provided important insights for the foundation as it was thinking about how to integrate formal evaluation more fully into its operations and programs.

➢ As is fairly typical, the evaluators were brought in well after the program had been designed and after much undocumented activity had occurred. They were unable to set up a protocol for information gathering that tracked progress over time on a program that was all about change over time.

➢ In most cases, there was very little that could be measured. Goals and outcomes were often not clearly articulated; there was little formal statistical data gathering; and, where data was gathered, it was not consistent across projects.

➢ The scale of what was to be assessed was very ambitious. As a result, many of the findings of the evaluation were fairly general and somewhat inconclusive.
An audio membrand held a Concert Companion PDA before a live test in Saratoga, N.Y.
Back to the Drawing Board (Again)

During the summer of 1999, Knight staff had to make a decision. Armed with the lessons from the evaluation and their own observations, should they declare success and suggest that the foundation move on to other priorities? Or should they recommend building on what had been learned, tightening up the program, adding additional orchestras from Knight communities and try to expand the chance for a more significant impact? There was unanimous consensus for the latter course.

Redesign

There were several crucial elements to what became known as Phase 2 of the Magic of Music program. First the goals of the program were made clearer than they had been in Phase 1 with a much more explicit focus on audiences and markets. The goals were as follows:

1. Supporting programs that produce a demonstrable increase in the ticket-buying audience.

2. Helping orchestras develop a stronger sense of connection with new and potential audiences.

3. Enhancing relationships among musicians, orchestras, audiences and communities.

4. Developing a clearer understanding of the market dynamics in which symphony orchestras seek to build and nurture audiences.

Further, there were other changes that would influence the way the program was carried out and the ultimate results.

Expansion of the Program to Knight Communities

Back in 1993, Knight Foundation had initially wanted to direct the new orchestra program to institutions in the 26 communities in which it operated. However, the initial response to its first request for proposals from orchestras in those communities was so lackluster that it decided to look elsewhere for grantees. In the ensuing years, things had changed. Now with the lessons learned from the first phase of the program and with an initial group of funded orchestras available as potential models, the staff had confidence that there might be greater success with
the original target group. This was, after all, the constituency that the foundation had been established to serve, so finding ways to do so became a priority. By allowing them to enter the grantee pool in Phase 2, foundation staff believed these orchestras could benefit from what had been learned and contribute to the pool of innovative ideas.

➢ Developing and Sharing Models through Consortia

Closely related to the expansion of the program to Knight communities was the idea of having orchestras work together in small consortia, sharing ideas and learning from one another. With the first phase of Magic of Music demonstrating the promising nature of certain models, a consortium would become an expanded laboratory to test them. Orchestras would be encouraged to find partners, and applications would be accepted only from those that had found at least two partners to work on the same general model.

➢ Audience Research

Phase 1 had demonstrated just how little the field knew about potential audiences, especially those not attending their concerts. Knight Foundation intended to commission audience research and all of the orchestras would be expected to participate in it with the intent of measuring audience motivations, attitudes and behavior. The larger pool of orchestras in this phase would ensure a sufficient “gene pool” for data analysis, benchmarking and longitudinal tracking of change over time.

➢ Group Learning, Technical Assistance and Information Dissemination

Additional learning components were included in Phase 2 that had already proved successful and new elements were added. The retreats that brought all the orchestras together became annual events, new training programs in market research and analysis were added and presentations by outstanding national resource people whose expertise (often in other fields) could shed light on the problems of orchestras were incorporated. There was to be continued access to the program consultants for facilitation and program-related assistance. Finally, something new was also added: the foundation promised to communicate what it was learning to the broader field of orchestras, to funders and to the general media through publications and other presentations.

➢ Tighter Evaluation

The staff’s concerns with the Phase 1 evaluation suggested changes that they wished to build into the program evaluation in Phase 2. Consultants would be chosen to work with the orchestras from the beginning to help them design their projects in ways that led to logical evaluation strategies. These would be carefully coordi-
nated so that an overall program evaluation could be accomplished for the foundation. Each orchestra was to design a logic model, and data was to be collected and reported regularly so that it could be analyzed and incorporated into adjustments to program design as the projects rolled forward.

The Classical Music Consumer Segmentation Study

Blasting Through the Fog
If Phase 1 of Magic of Music had proved anything, it was that American orchestras operated in a fog of vague assumptions about the behavior of audiences. These included such assumptions as:

➢ If you can get people into the concert hall once, they will most likely want to come again.

➢ People who come to the concert hall to hear one kind of music (say pops programming) can eventually be persuaded to buy tickets for a very different kind of music (classical music).

➢ Free concerts in the community (or even in the concert hall) are a good way to get people to buy tickets for concert hall programs later on.

➢ If you provide good audience education opportunities, those who need the education most will take greatest advantage of them.

➢ Exposure programs for youngsters are an excellent form of audience development since these will be ticket buyers in the next generation.

Each of these assumptions and many others were turning out to be impossible to demonstrate, at least among the Magic of Music orchestras, and many looked as though they were simply wrong. Further, the staff realized that despite extensive research on those attending their concerts, the orchestras knew virtually nothing about the predilections and behaviors of anyone else with respect to classical music and their concerts. The larger field had little information to share on nonattenders – presumably exactly the group that everyone was targeting to reverse the audience declines of the past years.

Accordingly, Knight Foundation decided that it was time to blast through the fog and to commission a significant piece of research on audiences. Without it, there would be little statistical basis for assessing whether the goals of Magic of Music orchestras were realistic and whether the projects made sense. Thus, each of the 15 orchestras eligible for a Phase 2 program grant was required to participate in the research study if they wanted to receive a grant. Each orchestra contracted separately with the research firm – Audience Insight LLC – not only for the stan-
standardized research that would be done in all markets but for individual research appropriate to its specific market and to its own internal needs. In 2000, the study was initiated.

The study was unique in scope, focus and design. More than 11,300 random sample telephone interviews were fielded in the 15 markets. These were preceded by a national telephone survey of 2,200 adults. In addition, 1,500 orchestra ticket buyers were surveyed by mail in each market (750 subscribers and 750 single-ticket buyers), yielding just over 10,000 responses. At the end of the two-year study the 15 orchestras were able to compare national results with market-area results and results for their own ticket buyers – along a range of variables relating to classical music participation.

Pointing to New Paradigms

The study findings surprised many who had, over the years, come to certain conclusions about classical music audiences.

➢ First and most surprising, the potential audience for classical music was vast. Nearly 60 percent of adults expressed at least some interest in classical music and nearly one-third of this group appeared to fit classical music into their lives on some regular basis. Twenty-seven percent of adults met the researchers’ criteria for what might be called symphony orchestra prospects.

➢ More than half of those interested in classical music listened to it on the radio at least several times a month. Almost three-quarters owned at least one classical CD and on average they owned 16 classical CDs.

➢ Most of those who expressed some interest in classical music did not consider the concert hall the preferred place to listen to it. The automobile was the single most frequently used venue for classical music, followed by the home.

➢ Classical music may be a complex art form, but only 6 percent of those interested in classical music considered themselves very knowledgeable about it, while more than half described themselves as “not very knowledgeable.” Still, it gave them enjoyment.
➢ Of those interested in classical music, 78 percent described themselves as casual listeners, undermining further the traditional profile of classical music lovers as seriously involved concertgoers.

➢ In fact, 12 percent had never even heard of their local symphony.

➢ For symphonies, the good news about the numbers of classical music prospects was a mixed blessing since affinity to the art form did not necessarily translate into attendance at orchestra concerts. Fewer than 5 percent of those interested actually patronized their local symphonies.

➢ Of those who did patronize their local symphony:
  ➢ 40 percent had never purchased a ticket.
  ➢ Only 8 percent were inclined to buy a subscription.

➢ A very small percentage of those who attended (18 percent) were actively involved in making the decisions, organizing the outings and purchasing tickets (the researchers called them “initiators”). By far, the majority of those who attended (the “responders”) left these decisions and activities to others.

➢ If orchestras could capture only 10 to 20 percent of the adults in their market who said they were “very interested” in attending their concerts, the average orchestra’s audience would double in size.

➢ In trying to profile the factors that might predict a ticket buyer, one statistic stood out: 74 percent of them had played an instrument or sung in a chorus at some time in their lives. If the results of the research were to be believed, then a completely new approach would be required to capture the large, untapped audience not currently supporting orchestra programs. Non-attenders looked very different from the standard concert hall audience, as their connection to music was often casual and uninformed. They related to classical music in a different way than the core audience “experts.” The concert hall was, for any number of reasons, not their venue of choice. Old assumptions about getting them into the concert hall as single-ticket buyers and eventually turning them into subscribers were completely unrealistic. It was a brave new world in which orchestras might have to take their product to people (rather than have people come to them), embrace technology and be satisfied with supporters
who neither gave money nor paid for a ticket. It was also clear that there needed to be new efforts to identify and focus on those who were most likely to be the decision-makers and ticket buyers while representing only a fraction of the potential audience.

For orchestral music education programs, there were equally startling implications. Large concert formats for school children had been the dominant form of educational presentation for decades based on the presumption that such exposure was the best way to produce the next generation of ticket buyers. Yet there was little evidence that such programs had the desired effect. On the other hand, participatory education programs – ones in which children actually played instruments and sang in choruses – were strongly correlated with later concert attendance.

Resistance at Home

The consumer segmentation study stated the challenges for symphony orchestras in America in a new way. No longer was the challenge how to get more people to buy tickets for the existing product provided in the old same way, and in the old same place. Rather, it 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.

All of the orchestras received visits from the researchers to interpret local data and apply the findings to local challenges. There was a wide range of expectations, interest areas, curiosity levels, capacities to absorb, and willingness to reflect on difficult and complex issues. Some orchestras took to the research right away, trying to plumb its meaning and its implications for change. But in other cases there was only casual interest and many reasons given why it would be difficult to change. The field, at least as exemplified by some of the orchestras, seemed to be wedded to the traditional organizational model when the research was suggesting otherwise.

Orchestras continued to point to restrictive musician contracts, mission statements focused on “quality” even though this issue was not at the top of most consumers’ concerns, and a definition of classical music that the consumer, meanwhile, seemed to be appropriating and refashioning into something different. Orchestras were hampered by high staff turnover and low job satisfaction, a legacy of mistrust between management and musicians, and inefficiencies that prevented effective collaboration. The research begged for new ideas but in many cases the energy and capacity to explore fundamental experimentation, especially given a lack of capital investment, simply wasn’t there.
Phase 1 of Magic of Music had demonstrated that change in the orchestra field takes time, so it was not surprising that the response to the research was initially mixed. However, by the end of Magic of Music in 2005, there were more encouraging signs. The Saint Paul Chamber Orchestra, for example, had moved from a reliance on a central concert hall to a more decentralized system of venues, in direct response to research findings. The Detroit, Kansas City and Long Beach symphonies had shared in the development of new marketing software—called ORBIT—that was a direct response to the findings about “initiators” and “responders” from the research. The Philadelphia Orchestra began experimenting with a more informal concert presentation format in its summer season, with musicians announcing the musical works from the stage. While hardly radical, for a conservative institution like the Philadelphia Orchestra, it represented major change. These and other related developments indicated that over time the field would probably adapt their modes of operation as the research findings sank in and successful innovations were proved through wider practice in the industry.
The Oregon Symphony and the Portland Opera Chorus performed Defiant Requiem; the presentation was recorded and broadcast on PBS in August 2003.
The board and staff of Knight Foundation had high hopes and expectations for Phase 2 of the Magic of Music program. For a number of years, orchestras had experimented with new ideas and the foundation had brought representatives of the orchestras together to share what they had learned. In that time, the foundation had adjusted its own strategies based on lessons learned. It had tightened its goals for the program and had invested in groundbreaking research that had formed the theoretical underpinnings for achieving those goals. Finally, it had invited additional orchestras into the program from its own operating communities—a step that had always been a priority. Now it was time to see whether all of this would pay off.

The Consortia

Thirteen orchestras (eight from Phase 1 and five that were new to the program from the Knight communities)\(^9\) were encouraged to discuss possible projects for Phase 2 and ultimately to gather themselves into logical groupings by interest area. Each of these groupings, or consortia, would have an organizing theme, a set of shared goals and philosophy, and each would explore an initiative of mutual interest to participants. Initially, it was thought that the Phase 1 orchestras might mentor the orchestras new to the program, but there was much resistance to that concept since it was felt that each participant could bring new ideas to the table and share them on a peer-to-peer basis. The hope was that collectively much could be learned. The three consortia with the organizing concepts and their membership were as follows:

1. **Enhanced roles for orchestra members in reaching new audiences**: Brooklyn, Charlotte, Fort Wayne, New World and Saint Louis.

2. **Educational activities and technological applications to increase audiences’ knowledge and awareness**: Detroit, Kansas City, Long Beach and Saint Paul.

3. **Audience development through program innovation in the concert hall**: Colorado, Louisiana, Oregon and Wichita.

While all the consortia turned out to be successful in information sharing and as learning vehicles, some went further than others. In one of the consortia, for example, some members shared innovative concert formats and commissioned music together. In another, they shared in the development of software. All the consortia met regularly in person and by phone; the costs of doing so were built into their grants from Knight. In addition to staff, musicians often participated in consortium meetings as did some board members, though music directors for the most part continued to be absent. Some consortia met face-to-face two or three times a year, others only once a year. But all found the idea of working together energizing and useful.

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\(^9\) The eight carry-over orchestras were Brooklyn, Colorado, Kansas City, Louisiana, New World, Oregon, Saint Louis and Saint Paul. Orchestras new to the program from Knight communities were the Charlotte Symphony, Detroit Symphony, Fort Wayne Philharmonic, Long Beach Symphony and Wichita Symphony.
What Was Promised and What Was Delivered

Over the course of five years, orchestras pursued projects related to the general theme of their respective consortia. Because Consortium 1 got a head start, four of its orchestras received the full five years of funding; other consortia took longer to get started and were supported for a shorter time.¹⁰

A description of the projects and what was accomplished follows.

1 Consortium 1: Enhanced Roles for Orchestra Members in Reaching New Audiences

➢ Brooklyn Philharmonic ($50,000 for planning in 2001 and $350,000 in 2002 over three years) – The goals of Brooklyn's project focused on reaching new audiences, building institutional connections externally and strengthening internal relationships (especially enhancing the role of musicians). Musicians played a major role in the planning and delivery of audience engagement activities that included First Saturdays, a series of events at the Brooklyn Museum of Art; Music Off the Walls, another Brooklyn Museum series relating music to art in the collection; Music Off the Shelves at the Brooklyn Library relating music to literature; and Music in the Sanctuaries at various houses of worship.

Results: Perhaps as much as any orchestra, Brooklyn was able to shift its focus from the concert hall to the community with the assistance of its musicians. The audience engagement activities throughout the borough of Brooklyn came to represent a substantial redirection of priorities and ended up going well beyond Magic of Music programming. Additional off-site programming extended to new social service activities, lunchtime concerts and a new chamber music series developed off site. The communication between stakeholders – music director, musicians, board and staff – also seemed to blossom and the musicians took an increasingly active role despite a period of budgetary challenges. New audiences increased, though this did not convert into substantial new ticket buyers in the concert hall. By the end of the project, the expansion of audiences in the community came to be an organizational goal for its own sake, not as a tool for increased ticket sales.

➢ Charlotte Symphony ($300,000 in 2000 over two years and $350,000 in 2002 over three years) – The Charlotte Symphony’s goal was audience development through meaningful community engagement activities using musicians in new and creative ways. Not only was there a desire to increase the number of people attending orchestra events but also the diversity of the audiences in the concert hall (including African American, Latino/Hispanic, Asian American and suburban). Musician and staff training were intended to enhance the effectiveness of these community events, and enhanced technology in

¹⁰ Technically, the Consortium 2 and Consortium 3 grants were awarded in the same year as the Consortium 1 grants (2000). However, the award date for Consortium 2 and Consortium 3 was Dec. 5, so functionally the projects did not begin until the next year.
marketing was intended to help increase ticket sales.

Results: Like many orchestras, Charlotte discovered that there are many benefits to community engagement activities but that creating ticket buyers is not one of them. The orchestra strengthened its relationships with many communities and with community institutions, and its musicians and staff benefited from training that increased their effectiveness in outreach activities. More nontraditional venues were used, thereby allowing the orchestra to reach audiences that would be unlikely candidates for the concert hall. Increased use of technology in marketing did increase single-ticket sales somewhat, but not explicitly because of the community activities.

➢ Fort Wayne Philharmonic ($300,000 in 2000 over two years and $350,000 in 2002 over three years) – Fort Wayne used Knight funding to develop its Unplugged concert series in which the orchestra presented classical music in an informal format to attract a younger audience and ultimately to have them “cross over” as ticket buyers to more conventional offerings. Musician participation in this process, both on- and offstage, was to be a critical element in changing the internal culture of the orchestra and its external image in the community.

Results: The series was successful in reaching first-time concertgoers as well as audiences under the age of 30, though there was little evidence of any “crossover” ticket buying. For the most part, those who became Unplugged ticket buyers did not convert their ticket buying to other offerings of the orchestra. A collaborative approach to planning these events involved musicians and other staff, and this created an institutionwide sense of ownership of everything from the artistic product itself to related marketing efforts and organizational planning. Externally the image of the institution also changed. The series created its own audience following and was continued beyond the period of Knight’s funding.

➢ New World Symphony ($400,000 in 2000 over two years and $350,000 in 2002 over three years) – New World, as a training orchestra, was less focused on audience development and most concerned with giving young musicians enhanced, supervised opportunities in audience and community engagement. This included informal concerts in nontraditional venues for nontraditional audiences, and it also included outreach seminars. The orchestra extended its musician training to include participation in innovative and enhanced concert presentations in the concert hall through its In-Context festivals involving repertoire performed in its greater social and political context, innovative use of Internet2 technology in the concert hall, special lighting effects and other elements.

Results: New World’s effort to provide young musicians with the experience of getting out into the community and giving them the training to succeed at it worked well.
increased this aspect of its ongoing training of young musicians as a permanent part of its operation. The In-Context festivals and innovative concert formats proved of great interest not only to local audiences but to other orchestras. The use of the Internet2 technology in concert and nonconcert situations was groundbreaking. This included the Miami-based workshop session mentioned earlier in which music director Michael Tilson Thomas participated live from San Francisco.

➢ Saint Louis Symphony ($400,000 in 2000 over two years and $350,000 in 2002 over three years) – The Saint Louis Symphony was in an excellent position to test the hypothesis that free community events can induce ticket-buying from the individuals who have been targeted. The orchestra had developed effective, musician-initiated community programs in Phase 1; they had instituted musician training; and they had developed an expanded marketing strategy carefully targeted to promising ZIP codes. A system was put in place to create test groups of prospects, developing inducements to get them to free community events and tracking their actions to ascertain whether they would become ticket buyers. Professional development activities were increased as were the number of community sites for free programming.

Results: The results of Saint Louis’ “conversion” experiment were disappointing. With almost a decade of experimentation, the Saint Louis Symphony was ready to conclude that free community events were not a cost-effective sales tool to create ticket buyers. On the other hand, the free community programs became even more integral to the orchestra’s activities, especially as it tried to change its image locally in its efforts to garner tax-district support. Despite musician involvement in planning the program, the project underwent a serious setback as the orchestra responded to a budget crisis followed by a long strike.

2 Consortium 2: Educational Activities and Technological Applications to Increase Audiences’ Knowledge and Awareness

➢ Detroit Symphony ($450,000 in 2000 for three years beginning in 2001) – Detroit’s project focused on increasing audience attendance through the strategic use of education and audience development programming. Among the elements were the e-Concert Initiative (e referring to “enhancement”) with a new Subscriber Guide, a special compact disc with program information and musical excerpts, a new series of so-called e-Concert events, pre- and post-concert activities such as films, and chamber music performances. As part of its participation in the Knight consortium and in response to information from the consumer-segmentation research described earlier in the report, the orchestra participated (along with Kansas City and Long Beach) in the development of new software (ORBIT) to encourage ticket buyers to organize outings to the orchestra with friends.
Results: The orchestra’s efforts to build audiences through educational efforts and the e-Concert approach were not deemed successful. The e-CD, in particular – one of the more expensive elements of the initiative – was abandoned and the money was allocated to other initiatives growing out of the orchestra’s long-range planning process. The ORBIT project was one of the few aspects of the initiative that seemed to have long-lasting value.

Kansas City Symphony ($450,000 in 2000 for three years beginning in 2001 and $132,000 in 2003 for development of the Concert Companion) – Kansas City’s original project was to develop an online adult-learning environment connected to thematic programming presented in a nontraditional format. This included themed festival concerts (presentation of multiple events around a certain cultural, thematic or historical context) coupled with a website dedicated to adult learning through an online community experience. In the third year, the project changed direction and focused on the initiation of a series of concerts aimed at new concertgoers.

An entirely separate project was funded with a second grant from Knight in 2003. The brainchild of the orchestra’s former executive director and an outgrowth of the experience of Phase 1, the so-called Concert Companion project involved the development of a hand-held computer device that provided simultaneous program notes on a computer screen in the concert hall and was intended to entice people unfamiliar with classical music, much as an Acoustiguide provides analogous experiences for museum visitors.

Results: As the original project developed, it became clear that the proposed educational strategies were not effective in developing audiences. Based on the results of the consumer-segmentation study, the orchestra decided to add new venue opportunities as a focus and, in the third and final year of the grant, created Classics Uncorked, a series of gateway experiences that incorporated a short chamber orchestra program preceded by a wine tasting in the city’s renovated train station. It also participated in the development of the ORBIT software mentioned earlier.

With respect to the Concert Companion project, by 2005 the device had been piloted with a number of major orchestras including the New York Philharmonic and the Philadelphia Orchestra. It received wide coverage in The New York Times, The Wall Street Journal and many other publications nationally and internationally. A collaboration was being developed with Apple Computer, the London Symphony Orchestra and the Juilliard to create and collect textual content to accompany classical music recordings sold through Apple’s iTunes Music Store. In many respects, this project was the most potentially transformational of all those funded by Knight and brought in more funding from other foundations than any other.
Long Beach Symphony ($30,000 for planning in 2000 and $275,000 in 2002 for three years) – Long Beach’s Musical Bridges project was an effort to attract new Latino audiences through education and innovative community partnerships. Highlights included concerts at the Museum of Latin American Art, a world premiere of *Cinco de Mayo*, composed by the orchestra’s music director, and a joint commission of *Dos Visiones*, inspired by the permanent collection of the Museum of Latin American Art (the museum launched a related exhibit in the months prior to the premiere). The project also involved the joint software development initiative (ORBIT) with Detroit and Kansas City, described earlier.

**Results:** Working with a Latino Advisory Council and with Latino organizations, the orchestra began to see modest increases in attendance from the Latino community not only at the specially designed programs but at its Classics concerts as well. Outreach became a greater focus of the orchestra’s mission as the people within the organization noted these successes. The orchestra also helped develop and implemented the ORBIT software.

Saint Paul Chamber Orchestra ($500,000 in 2000 for three years beginning in 2001) – Saint Paul continued the development of its adult education initiative called Musical U begun in Phase 1 to appeal to a broad cross section of current
and prospective audiences. The program was patterned on a continuing-education model, offering classes on a varied range of topics in classical music. In 2004, Musical U became incorporated into the regular budget of the orchestra, and Knight funds were reallocated to a special project focusing on the development of a new artistic leadership model. The model was intended to engage orchestra members more deeply in artistic direction and organizational governance and avoid the need for a full-time music director.

Results: Musical U turned out to be a successful audience enhancement offering but continued to serve primarily those who were already ticket buyers. With the reallocation of funding, the orchestra undertook some groundbreaking work, challenging the traditional artistic structure of the industry. Instead of an all-powerful (and often largely absentee) music director, Saint Paul replaced this traditional model with a combination of outstanding outside artistic advisers coming in for extended periods and an empowered musician structure taking on many more artistic responsibilities. In addition, as a result of the consumer segmentation study, the orchestra moved many of its concerts outside of its primary venue into the community, changed its pricing structure, and saw a substantial increase in ticket sales the first year (the final year of Knight funding) and very high retention rates in the second.

3 Consortium 3: Audience Development Through Program Innovation in the Concert Hall

➢ Colorado Symphony ($300,000 in 2000 for three years beginning in 2001) – Colorado wanted to develop new audiences from a highly educated, 30- to 45-year-old segment of the population employed in the high-tech and telecommunications industries. The hope was that this could be accomplished by using the innovative concert formats called Nerve Endings that the Oregon Symphony had developed in Phase 1 of Magic of Music.

Results: Two Nerve Endings concerts were produced in Denver, but ultimately the Colorado Symphony decided to create its own innovative concert formats. These special offerings were sufficiently successful that they became a standard component of the orchestra’s planning. With the downturn in the high-tech and communications industries, the initial audience development efforts were broadened to other segments. However, no dramatic increases in ticket sales were reported.

➢ Louisiana Philharmonic ($200,000 in 2000 for three years beginning in 2001) – Louisiana presented a series of five concerts, American Crossings, which traced the legacy of New Orleans music and its influences on European and American classical composers. The programs incorporated technology, stagecraft and dramatic effects in an effort to attract a broader, more diverse audience through innovative programming and a revitalized image. Three new compositions were commissioned, including one commission with Magic of Music consortium partners.
Results: The Louisiana project was successful in attracting more African Americans to the concert hall than had been the case in the past, though for the most part audiences were modest for most Knight-funded events. The new concerts did help change the image of the orchestra locally from an institution focused on affluent white patrons to one more inclusive of the entire community. This seemed to propel the orchestra forward as it reached out beyond New Orleans to other Louisiana communities with its innovative programs. Tragically, after the devastating hurricane in 2005, the orchestra’s major focus became its ability to survive.

➤ Oregon Symphony ($350,000 in 2000 for three years beginning in 2001) – Oregon’s project involved several components. The first was helping other orchestras in the consortium market and produce its alternative and innovative Nerve Endings concerts, developed in Phase 1. The second component, called the Creative Empowerment Project, provided opportunities for musicians to design their own special projects and to receive training in how to relate to audiences. Finally, funding was used to develop and produce a major multimedia production both for live performance and television called Defiant Requiem: Verdi at Terezin, a restaging of a performance of the Verdi Requiem that had been given by Jewish inmates at the German concentration camp.

➤ Results: The sharing of concert formats with other orchestras took place during the first year of the grant. Thereafter the other orchestras developed their own programming. The alternative concert formats that were developed in Oregon continued to bring new audiences into the concert hall, though the gains did not transfer from the Nerve Endings programs to other concert series. Defiant Requiem, produced first in Portland, Ore., and later aired on national television through the Public Broadcasting System, was the most memorable production developed during these years. Using actors, singers, historic film, interviews with survivors and the orchestra itself, the production provided a moving account of Jewish resistance to the Nazis through music. The other component of Oregon’s Magic of Music activity, the Creative Empowerment Project, engaged some orchestra members not only in developing community-based events but also involved them in the broader scope of the Oregon Symphony. The accomplishments of the orchestra over the years were compromised to an extent by a musicians’ strike during the course of the grant.

➤ Wichita Symphony ($300,000 in 2000 for three years beginning in 2001) – The Wichita Symphony developed and performed a new series titled Sound Waves. Its purpose was to attract new audiences with a format that was more engaging and interactive than standard symphony presentations. The orchestra also hoped to present a new and different image of classical music concerts as accessible and inclusive.
Results: Initially, there was resistance among some in the community and in the audience, including the local newspaper’s arts critic. On the other hand, a collaborative spirit was developed internally in developing the program as music director, musicians, staff and board worked together. There was significant survey and focus-group work done to understand audience reactions and preferences. Ticket sales for Sound Waves concerts were strong (about 80 percent of capacity), and for some of the events there were significant numbers who had never attended a WSO performance or even a classical music event. As in other orchestras, there was no evidence of crossover to other concerts.

The Final Evaluation

As the foundation staff was preparing for Phase 2, there was discussion about the need for a second evaluation that would correct some of the problems encountered with the first. The foundation contracted with Philliber Research Associates to design and carry out the evaluation, asking the consultants to be involved in the program’s design from the outset. This strategy turned out to have many benefits including the fact that the consultants could help the orchestras design their projects in a way that allowed for the development of logic models in each orchestra and regular data collection and analysis across projects. Evaluation strategies included:

- Activity tracking – From September 2000 through August 2004, staffs from 13 orchestras submitted quarterly reports detailing events, organizational development activities, marketing strategies and perceived outcomes related to Magic of Music activities.

- Audience/participant surveys – Concertgoers and participants in educational programs completed more than 27,000 surveys regarding their concert and educational experiences and their perceptions of the orchestras. While the majority was collected during Magic of Music events, other data-collection strategies included mailings to subscribers and targeted ticket-buying constituencies, Internet-based questionnaires, attendance cards distributed at free events, telephone surveys and community surveying.

- Event observations – Philliber Research Associates staff members visited 13 sites to observe concerts, adult-education classes and other Knight-funded events.

- Ticket sales data – Orchestra staff members submitted annual reports of subscription and single-ticket sales for both their main classical series and Magic of Music-funded events.
Stakeholder interviews – From May to November 2004, final evaluation interviews were conducted with musicians, staff, conductors and board members. Respondents were asked questions regarding their perceptions of the initiative, its related activities and its overall impact on their orchestras.

Overall, the 13 orchestras carried out 680 separate events over the four years of their projects with about 20 percent being full orchestra concerts and 40 percent being educational in nature. The events reached some 750,000 people and were supplemented by professional development activities and partnership activities of the consortia.

Ticket Sales: With respect to one of the main goals of supporting a demonstrable increase in the ticket-buying public, the results were disappointing. Overall, subscriptions declined 9 percent across all the orchestras (though the range was +18 percent to –30 percent), reflecting a national industry trend away from subscription sales. Single ticket sales showed a slight increase of 2 percent (with a range of +41 percent to –16 percent), which seems relatively consistent with the industry nationwide.

Would the trend have been worse without Magic of Music? It is hard to say, though unpublished industry data from the American Symphony Orchestra League suggests that subscription declines among some of the largest orchestras were even steeper during the period. Nevertheless, one would have to conclude that there were no magic breakthroughs that produced the kind of seismic change that the program’s designers had hoped for.

Innovation and Accomplishments: There were many other innovations that occurred in the course of the program, and these have been documented in the results already cited orchestra by orchestra. Chief among these were changes in the orchestras’ internal culture with considerably more musician involvement, innovations in concert presentation, a greater focus on and understanding of effective outreach, new forms of professional development and better ways for orchestras to work together on developing new ideas. In addition, the development of a deeper understanding of the cultural consumer through research was one of the program’s lasting legacies.
Sharing Ideas Through Supplementary Publications

In 2002, with Phase 2 well under way and more than $13 million either granted or committed, and with the consumer-segmentation study completed and published, the staff of Knight Foundation felt that it was time to share with the wider field what it had gleaned from the program. Penelope McPhee had already begun the dialogue with a speech that had first been offered at a Magic of Music retreat in April 2002, then at the annual conference of the American Symphony Orchestra League. Her speech was subsequently reprinted in Harmony (a periodical published by the Symphony Orchestra Institute).  

Issues Brief #1 was published in February 2003, dealt with the relevance of orchestras in the 21st century, the important distinction between program content (what is played) and its delivery (how and where it is offered), orchestra mission statements and lessons learned from the Magic of Music program (many of which can be found in Part VII of this report).

Issues Brief #2 was written by Alan Brown, then the president of Audience Insight LLC, which had carried out the consumer study, and John Bare, Knight’s director of evaluation. In the course of eight pages, it summarized the consumer-study findings and their implications (discussed in Part V of this report). It also offered a categorization of the 27 percent of adults in the United States who might be considered potential audiences for symphony orchestras with a description of characteristics that might be useful for orchestras trying to capture them.

Issues Brief #3 came out in October 2003 and was written by Leslie Whitaker and Susan Philliber from Philliber Research Associates, the firm that had been hired to evaluate Phase 2 of Magic of Music. Entitled “Bridging the Gap: Innovations to Save Our Orchestras,” it summarized some of the findings of the evaluation and discussed the characteristics of successful institutional change. It claimed that many of today’s orchestras seemed to “be misusing scarce funds by spending too much to please a shrinking subscriber base and not enough to attract new audiences who may hold broader definitions of classical music.”

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The last two Issues Briefs were again written by Alan Brown. Issues Brief #4, which came out in July 2004, focused on the different types of audience members that had been identified in the consumer research: *initiators* (those who organize cultural outings for friends and family) and *responders* (those who are there because the work of planning and ticket buying has been done for them). It imagined a new sales paradigm that would focus on initiators in order to increase ticket sales and attendance.

Issues Brief #5, entitled “Smart Concerts: Orchestras in the Age of Edutainment,” came out in December 2004 and discussed concert enhancement strategies that seemed to be successful in attracting new audiences. Among the general topics discussed (with concrete examples from actual practice) were contextual programming (designing programs around themes and unifying ideas), multimedia presentations that combined music with other art forms, visual enhancements (such as video) and embedded interpretation (e.g., supertitles, simultaneous program notes via hand-held computers, audio clips and educational CDs, among others).

For a program like Magic of Music, many of the most important accomplishments and legacies rapidly become lost since so much of the program occurred in performances and other ephemeral events that were neither recorded nor otherwise captured for posterity. By way of contrast, the Issues Briefs, along with the consumer segmentation study, offer dynamic evidence of the kinds of innovation that were built into the fabric of Magic of Music and they continue to be available in print and electronic form.

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In 1998, the Louisiana Philharmonic Orchestra's Connections series was enhanced by onstage video.
Lessons for Orchestras

1 The problems of orchestras stem not from the music they play but from the delivery systems they employ. Some people have claimed that the audience for classical music is dying and with it the symphony orchestra. But the first part of that statement is verifiably untrue. More than 60 percent of Americans have had some connection to classical music broadly defined, based on Knight’s own research, and fully one-third of these individuals fit this music comfortably into their lives at home and in automobiles. Unfortunately, only a small fraction attends orchestra programs in concert halls. As Frederick Starr claimed back in 1988 in his speech to the American Symphony Orchestra League, “The problem is not the music.”

2 The mission of an orchestra needs to be clear, focused and achievable. An orchestra can no longer afford to promise all things to all people. A mission statement that promises a world-class touring and recording ensemble, extensive local outreach, broad public-school education, a commitment to new music, musician development and community service may be promising far more that it can deliver and end up doing many things badly. It may also find itself with deep deficits. Orchestras must respond to the needs of their constituents and become committed to serving their audiences in ways that they want to be served.

3 Orchestras that are not relevant to their communities are increasingly endangered. The caliber of the playing, the renown of the conductor and the architecture of a world-class hall mean nothing if an orchestra’s programs do not reverberate throughout the community. The more orchestras peel off 3 to 4 percent of an economically elite, racially segregated fraction of the community, the less they contribute to the vital life of a community. In the end, their very survival is placed in jeopardy.

4 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. An early major discovery of the foundation was that rarely were the important components of the orchestra family coming together to plan for the future. As a result, transformational change was being blocked. Music directors were largely absent, musicians and management engaged in discussion through collective bargaining, and trustees and musicians seemed completely removed from one another. Ten years later, due to the efforts of Knight and others within and outside the orchestra field, barriers are being removed and genuine and substantive dialogue is occurring.

5 No single magic bullet will address the many serious problems that orchestras face. Magic of Music started with the simple premise that changes in the concert hall experience would transform orchestras. That turned out to be simplistic. More varied and interesting programming, a revitalized concert hall experience, more involved music directors, better marketing, enhanced
participation of musicians in governance and decision-making, less restrictive collective bargaining agreements, more innovative use of technology, alternative leadership models, larger endowments, more education and outreach – all these things and others can contribute to solutions. Yet it is their combined power to produce transformational change that orchestras must unleash.

6 Free programming and outreach do not turn people into ticket buyers. If the Knight program dispelled one myth, it was the long-held axiom that the way to develop new ticket buyers was to give them free tickets or programming. Free and subsidized outreach can be valuable for its own sake and is part of an orchestra’s service to its community. But it is not a technique to market expensive tickets. Similarly, new audiences can be attracted to orchestra programs using various methods. Yet there is little evidence to suggest that significant numbers of them can be retained without more sustained follow-up strategies.

7 Traditional audience education efforts, designed to serve the uninitiated, are often used primarily by those who are most knowledgeable and most involved with orchestras. Over and over again, Magic of Music orchestras chose to abandon programs designed to attract new audiences because it was the subscribers who took advantage of them. The challenge in allocating audience education resources became how to balance the need to retain current audiences with the desire to attract new ones.

8 There is a lot of evidence that participatory music programs – including instrumental lessons and choral programs – are correlated with later attendance and ticket buying at orchestral concerts. Traditional exposure programs, such as orchestras’ concert hall offerings for children, seem to have little long-lasting effect on later behavior.

9 Orchestras need to do more research on those who do not attend their concerts. Despite extensive research conducted on audiences and people who have been audience members, orchestras do very little research on nonattenders. Knight Foundation’s consumer study was groundbreaking precisely because it surveyed people who did not attend orchestra concerts. The research revealed many surprises and dispelled many myths. More research has to be conducted on this group if they are to be attracted to the concert hall.

Lessons for Funders

1 To produce transformational change in a field, the dollars and time invested need to be commensurate with the scale of the industry. No one at Knight Foundation imagined in 1994 that the investment in the orchestra program would last a decade and would exceed $13 million. But having taken on such a formidable challenge in the largest single segment of the nonprofit performing arts industry, a small
program with a modest investment over three to five years would have been
totally inadequate. Change takes time; significant change takes a significant
amount of time.

2 Dollars are only a small part of what a committed funder can contribute to
assist institutions and a field. Knight Foundation commissioned ground-
breaking research (the largest consumer survey ever conducted in the classical
music field); sponsored retreats and other dialogue sessions where its role as
convener was vital to bringing disparate individuals to the table; set up and
funded working consortia of institutions; provided technical assistance,
publications and evaluation services. In the end, the legacy of these contri-
butions may be as great or greater than the grant dollars.

3 Funders need to be clear with themselves and with grantees about desired
outcomes. There is a tendency in the foundation world to “get out of the way”
of good ideas and not to be overly prescriptive. Funders may use vague terms
like “transformational change” and “shining eyes” (two terms used in Magic of
Music) or they may choose to give little guidance to applicants about what, very specifically, they are looking for.
Applicants can be equally vague in describing the outcomes of
the proposed project. Both will undermine effective grant
making.

4 Thoughtful programmatic innovation simply cannot
happen when an institution is in the midst of financial crisis.
As Penelope McPhee put it: “There was a flaw in Knight’s
theory of change. We hoped that by stimulating real
structural change in unhealthy orchestras, we could make
them healthy.” But time after time, those orchestras that were
in the most trouble financially were diverted from the focus of
their Knight projects. In one case, an orchestra had to be
dropped entirely from the program when the Knight money
was used primarily to meet payroll.

5 Strategic change cannot happen without strong consistent leadership.
Though Magic of Music orchestras were hampered by weak leadership in some
cases, a more common problem was the lack of continuity in leadership.
During the course of the program, the 15 participating orchestras had had 31
executive directors and 29 music directors. Had all the orchestras been
involved with the program for the full 10 years, the number would have been
much higher. The foundation, too, went through three program directors for
Magic of Music. By the time the final program retreat took place in 2005, only
eight out of 100 participants from the first retreat were in attendance.

6 Sometimes the unintended results of a foundation program are more signifi-
cant than those that were planned. Arguably, some of the greatest impacts and
lasting legacies of the Magic of Music program for the foundation and for
individual orchestras were not planned. The discovery that transformational
change simply could not happen without the substantive involvement of all segments of the orchestra family was accidental yet turned out to be one of the program’s most important legacies. With some of the individual orchestras, what occurred outside the initial grant-funded projects was often more important than the projects themselves. Philadelphia developed new decision-making models which, among other things, produced a groundbreaking agreement with musicians on how the orchestra would produce, market and pay for recordings. Saint Paul forged a new model of artistic leadership that eliminated the need for a music director. Kansas City developed the computerized Concert Companion when its initial project seemed to hold little promise of success. Wisely, the foundation funded the ideas, even when they had not been in the original project plans.

7 If something matters to the success of a program, do not be afraid to take a hard line even if it poses difficulties for grantees. A key strategic decision made by Knight was not to force the issue of music director participation short of requiring a signature on the application forms. Doing so would have been rather simple for the foundation – it could have stipulated that there would be no funding if music directors did not attend the retreats. Dates could have been set well in advance to accommodate schedules. In the end, the foundation accepted the assertion that this was simply impractical and too difficult. The result was that a crucial participant in the program remained absent and the program suffered as a result.

8 If a grants program is to be evaluated, it is best to think about evaluation at the very start and design the program in a way that makes uniform data collection and meaningful evaluation possible. Program evaluation that is intended to measure change over time must have access to the proper data. It must also be able to put in place hypotheses that are testable, and systems for information collection that are achievable.
At the Saint Paul Chamber Orchestra in 1998, Hugh Wolff led a Musical U class onstage at the Ordway Theater.
The opportunity to be an outside observer while a major grants program is taking place at a national foundation is rare. To be given free access to people and materials and then to be able to write about the experience with a free hand is even rarer. Knight Foundation has always believed that the Magic of Music should serve as a laboratory – both for the orchestra field and for grant-makers. So long as important lessons could be derived from it, the program could be deemed a success. Access to information was considered critical to this process.

As a consultant to the Magic of Music from its earliest conception until its end, I had a rare opportunity to observe the program and to interview those associated with it – in the participating orchestras, at the foundation, among the various research and consulting teams, and more broadly in the communities where the program was taking place. In addition, Knight Foundation allowed me unlimited access to its archive consisting of thousands of pages of documents. Nothing that I wished to see was denied to me, and no one was unwilling to talk with me. For that I am extremely grateful.

The work of observing Magic of Music has spanned the tenure of three Knight Foundation presidents – Creed Black, Hodding Carter III and Alberto Ibargüen – as well as three program directors – Penelope McPhee, Gary Burger and Lisa Versaci. All provided ongoing support throughout the process, as did several other staff at the foundation, including John Bare, Knight’s former director of evaluation during Phase 2; and Larry Meyer, Knight’s vice president of communications and secretary. Others such as Mike Maidenberg (vice president and chief program officer), Donovan Lee-Sin (evaluation officer), and Julie K. Kohler (acting director of the National Venture Fund) were extremely helpful during the preparation of the manuscript.

Bill Keens, my partner at Wolf, Keens & Company, and Alan Brown, who served as principal investigator on the consumer segmentation study when he was with Audience Insight and wrote several of the Issues Briefs, were especially helpful as were the executive directors, trustees, musicians and music directors at various orchestras with whom I worked during the course of the program. I wish to acknowledge the wonderful work of Steven Wolff of Audience Insight and of Susan Philliber, Leslie Whitaker and Krischael Greene of Philliber Research Associates. I would also like to thank Jane Culbert and Ingrid Lembach at Wolf, Keens & Company for their invaluable assistance in making the document stronger.

With my appreciation comes assurance that the conclusions drawn in the preceding pages are my own, as are any errors of any kind.
The Wichita Symphony performed as part of its Sound Waves series in November 2003.
The orchestras involved in Knight Foundation's symphony initiative include:

- Brooklyn Philharmonic
- Charlotte Symphony
- Colorado Symphony
- Detroit Symphony
- Fort Wayne Philharmonic
- Kansas City Symphony
- Long Beach Symphony
- Louisiana Philharmonic
- New World Symphony
- Oregon Symphony
- Philadelphia Symphony
- Saint Louis Symphony
- Saint Paul Chamber Orchestra
- San Antonio Symphony
- Wichita Symphony

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