With the doors temporarily closed at our concert halls, orchestras are working hard to meet our communities where they are - in their own homes. Staying in touch with and engaging our patrons and donors is more important now than ever. We've assembled a panel of guests from the Chicago Symphony Orchestra to share what they've been doing to keep up their activity during the shutdown, and to prepare for a successful and resilient re-launch once it's safe to do so. Join us and the **Chicago Symphony's Jeff Alexander (President & CEO), Dale Hedding (VP Development) and Ryan Lewis (VP Marketing & Sales)** on Friday, April 17th at 1:30pm Eastern Time.



Presentation Transcript

Facilitated by Katherine Carleton, Executive Director, Orchestras Canada

Katherine Carleton: I'm absolutely thrilled to be here today and also delighted as the Executive Director of Orchestras Canada to be able to offer what I'm going to describe as the very first event in this year's national conference.

As some of you will recall, we were planning on holding our national conference in Hamilton, Ontario this year between the 20th of May and the 22nd of May. For obvious reasons, that's not able to happen. And instead what we've been doing is a lot of work and a lot of thinking behind the scenes to figure out how we can connect to you, how we can inform you, how we can engage you with some of the things that you might be most interested in knowing about.

This is sneak peek of the conference that isn't going to happen, but we will be offering programming under the title Re-launch between now and December 2020 to try to replace what we were going to be offering and to enrich it to be even more responsive to the things that you currently want to know.

So when we began to do some thinking about the kinds of questions that people were asking right now, it became very clear that all of your concerns were around how best to stay in touch with your patrons, how best to manage those incredibly important relationships. Even as you're dealing with internal stakeholders, your musicians, your staff, your boards, you know that it's so very important to maintain contact with the people who make it possible for your orchestra to exist, the donors and the ticket buyers.

As I began to contemplate and as I began to look at some of what was going on across the internet, I decided to call in an old friend to Orchestras Canada and an old friend to me personally: our dear former board chair Jeff Alexander, formerly of the Vancouver Symphony Orchestra, where he was President and CEO for an exceptionally wonderful period in that organization's life, but now is currently serving as President and CEO of the Chicago Symphony Orchestra (CSO). I approached Jeff about the prospect of talking with our group about what the CSO is doing to stay in touch with its patrons, ticket buyers, and donors through this period of time. Jeff suggested that he might want to bring on two of his brilliant colleagues to supplement what he had to say. So with no further ado, I'll pass the baton to Jeff.

Jeff Alexander: Thank you, Katherine, and hello everyone. It's great to see all of you, some familiar faces and many who I'm meeting for the first time. Very good to be with you. Yes, when Katherine contacted me a couple of weeks ago asking if I would participate in an event like this to talk about staying in touch with donors and subscribers and patrons in general, my immediate reaction was yes, because I'll do anything for Orchestras Canada. I've learned so much through my 14 years' affiliation with OC. But I did make one condition that I could bring along Ryan Lewis and Dale Hedding, our VPs for marketing and sales and development. Considering the topic at hand, they both are far more expert at these topics than I am. They're both excellent in the work they do. They were great when we were

under a normal operations and, as I thought they would, they've risen to the occasion brilliantly in this bizarre set of circumstances we all find ourselves in.

So I just wanted to give a general greeting to everyone. Today I'll be happy to pipe in from time to time, if there's a question that I feel I can answer. I think for the most part, considering the topic, I am putting you in very good hands with Ryan Lewis and Dale Hedding. So, thank you. Good to be with you, and I look forward to the next hour.

Katherine Carleton: Great. Thank you, Jeff. Thank you, Ryan. Thank you, Dale. So we've worked up some questions that I'm going to pose to Ryan, Dale, and/or Jeff, and we also have time at the end of the session to take questions from the floor that we'll ask you to submit through the chat box.

I framed this session as essentially being an exploration of how to stay in touch with ticket buyers, donors and past current and future friends of the Chicago Symphony Orchestra to ensure a rapturous and resilient relaunch when the time is right.

Q 1: What are you doing that is working? What has been less than successful? Why do you think this is – and how are you pivoting?

Dale Hedding: Well, Katherine, first of all, thank you all. We are thrilled to be here and excited to share with our colleagues what we're all learning and working on. As you said, pivoting is a key word in these times. Ryan and I and Jeff will share some concepts of what we're working on, what we're doing.

We also want to be clear: we recognize as well in Canada there's a wide range of orchestra sizes. Almost everything we're going to talk about is really based on solid best practices and fundamentals we should all be doing regardless of size. And you're going to hear a lot of examples of how good and frequent communication, constant engagement, inspiring messages, and most importantly, calls to action are critical to success right now particularly in a crisis mode, but always. So, as we talk about different elements and activities, we want to be clear that, for all of us, the only question is how you scale these practices to your own size or staff or budgets. It really shouldn't be a question of whether or not any of us should be doing them. We should be doing all of these kinds of things. We just need to make it work for our own types of organizations.

Ryan is going to get us started here with some of the things that are working for our organization.

Ryan Lewis: Thanks Dale, and hello everyone. I'm going to talk a little bit about communication before we can talk about communicating with our patrons and donors.

The most important thing is that we're communicating well amongst ourselves, starting with the staff. Our team was not used to working remotely all the time, so it's been a major adjustment for us to each be under stay-at-home orders and having to connect virtually. One thing that we made sure of was that we could communicate through a virtual experience like Zoom.

We're using Microsoft Teams primarily in our office right now. We've kept our regular schedule of staff meetings, making sure that every team is communicating regularly, keeping things on schedule, everyone knows what's going on, and trying to keep the team motivated. We actually have daily team meetings every single morning. Department heads check in and talk about what need, what problems need to be solved, what's happening in everyone's departments. Making sure the communication is moving smoothly ahead. We've also talked about our external communications and that it's important that we maintain communication with all of our key stakeholders, primarily the musicians of our orchestra. We have the musicians in our Chicago Symphony Chorus, our Civic Orchestra of Chicago, our Board of Trustees, all of our donors and various volunteer groups. And then we think about our patrons, our ticket holders, our donors, and the larger CSO family. And how do we communicate with each of those groups individually?

Jeff is great, and every time we have a big announcement, he tailors emails to each of those groups with an update from the company. We've also been in touch with colleagues across our industry. I know Dale has a group of colleagues that are the heads of development at major orchestras across the country. I've also been participating in

calls with marketing heads of major orchestras across the US, and we're keeping in regular contact about what we're seeing in each of our own cities and how we're seeing similarities and differences in our own local markets. And then I also have been keeping in touch with my marketing colleagues at other cultural organizations in the City of Chicago to find out how each organization, whether it's an opera company or a symphony theater, etc. on how we're all dealing with the same challenges in our hometown.

Dale Hedding: One of the things that's working is checking the temperature of our patrons and constituents often. I mean, imagine where we were all were three weeks ago, so checking in with everyone's perception, their moods, perceptions of how their own personal resources have been impacted. And again, it's changing frequently. Patrons and donors are willing to reengage so much more now, a month into this, and rechecking and understanding exactly where we stand has been a really critical piece for us.

Ryan Lewis: And when we think about our patrons as ticket holders, one of the most important things that we've focused on is offering patrons flexibility during uncertain times. So we've adjusted all of our communications to acknowledge the situation. We don't want to appear tone deaf.

As many of you are going through this, we're in a similar situation where we had launched our subscription campaign for the 20-21 season. We were right in the middle of that and were getting close to our renewal deadlines before the coronavirus situation hit. We've had to put the brakes on and think about what we can do to adjust our messaging, adjust our deadlines, and really work with our patrons to provide them the flexibility that they needed.

We're in a very unique situation in that last year we had a strike with our musicians that lasted for seven weeks, and we had seven weeks of cancelled concerts on the debts this year. The concert cancellations came almost one year to the day of when we went through this last year.

So I would say that as challenging as the strike was, it did provide us with a learning opportunity for going through something very similar this year. And we've resurrected some of the crisis communications tools and things that we had had learned and developed over the last year.

For our patrons, it's important for us to be in contact with them. And we're in touch through many channels: email, phone calls, voice blasts, you name it. And for ticket holders who had tickets to cancelled concerts, we're providing them multiple options of what to do with their tickets. One option is to exchange into a future concerts. Customers can also put the money on account for a future purchase, whether it's this year or towards the subscription for next year, they can ask for a refund, but the number one choice that we're trying to promote is that they consider converting the value of their tickets into a tax-deductible donation. And we're now building a campaign around this option as our preference for the organization. This is an example of how development and marketing are working so well together on this effort.

On our subscription campaign, again, we are trying to find ways to offer more flexibility. We've looked at our renewal deadlines. We are extending the deadlines more than in a traditional campaign and waiving our handling fees for subscribers that are renewed by a particular date. We're also trying to offer extended monthly payment plans for people that might be having hardships right now to allow more flexibility in paying over a longer period of time.

We talked a little bit about just how we're communicating with our staff and internal colleagues, and we're really relying on technology. Microsoft Teams has become very helpful as well as Zoom. We're trying to keep things light, so one thing we started was a digital water cooler for teams to have some fun and to keep things a little bit lighthearted during these challenging times. Right now, the current thread on our digital water cooler is everyone's posting photos of their pets at home, so we can see all the pets of CSO staff members.

Something else we're thinking about in terms of communicating with our staff in a larger way outside of email and meetings is, actually next week, Jeff is planning to lead a virtual town hall with members of our staff through Zoom. And that's something that we did in person last year during the strike. We brought the entire administration together on several occasions to allow people to come together and ask questions of our leadership. So we're going to plan that, but do it virtually.

Dale Hedding: And then one other short point, one of the things I learned early on: within the first few days, it became clear the volume of messaging that we had to put out to the public, to our constituents, to the staff teams, was going to become overwhelming, and it really challenged the normal hierarchy that we have in our two large departments, marketing and development. So very early on, it became clear that I could not handle all of that. So I had to elevate some of my development team to make them the point people with Ryan's team. And Ryan's going to talk about that momentarily, but I had to move some people around so they were point people on a lot of these key issues coming back and telling me what was going on so we could make group decisions. To facilitate this, we created a sort of crisis communication kit, which gets updated daily by my team working with Ryan's team, but it really is a kit the entire development team can take and just pull from, including a list of recent articles of relevance and recommended talking points. And we call them points of encouragement and then broad case statement points that the development team can be using in their quick emails and direct mail preparations and phone conversations with donors. This has really been a little bit of a game changer for me, and the machine flows much more smoothly with this in place.

Katherine Carleton: Great. I could sense the segway being set up for me very, very tastefully.

Q 2: ***How are you coordinating between the marketing and development departments when there's so much to do, and you're not even working in the same space?***

Ryan Lewis: And that goes back to our staff communication that I started talking about earlier, about how we're all trying to stay in touch with one another. I'm using these virtual tools. So it's important that even though we are a large organization - I think we have about a hundred staff members of the association - it's important, especially on the marketing and development side, to break down silos. That we're all one big revenue-generating team and that we all have an important relationship to manage with our patrons. We don't think about people as ticket buyers versus donors. They are our patrons, and we all have to manage that relationship and work together.

So a couple of things that we do: we have a marketing/PR strategy group, where the heads of the marketing and communications teams meet regularly to talk about how are we steering the communications strategy for the organization. And then we have a cross-departmental social media team that's been very active, especially right now, in developing digital content. That social media team is comprised of members of the marketing team of development, communications and the Institute, which is our educational department. They used to be weekly meetings, but while we've been in this period, they've actually been meeting sometimes twice a week, sometimes more, and they'd been brainstorming content and vetting ideas.

We have a shared content calendar and work with a digital marketing agency that then helps us publish and promote that content on our social media channels. So everything is planned out in advance. We decide what content should live organically on social media and what should have those advertising dollars behind it to promote to a wider audience.

In addition to social media, we think a lot about our email communications to our patrons. So every email that we send is planned in a calendar that's shared between our two departments with coordinated messaging. Every email list that we pull is segmented, and we use personal information to make sure that emails have the right message to the right customer at the right time. We also, in the last year, launched an online proofing system that's been a game changer. So everything that we're producing, whether it's an email, a video, a PR piece, goes into this online proofing system. Members of both departments have an opportunity to review content, make sure sponsorship information, crediting, tone of voice are correct. So many, many eyes on proofs. And we also work very closely with our development colleagues in use of our data.

Like many of you on this call, we use a system called Tessitura as our CRM. What's fantastic about Tessitura is it lets us look at the full relationship of the patron to the association: all of their ticket history, development, fundraising activity, all in one system. So we actually have several cross-departmental teams that use Tessitura, and we've been keeping those meetings going virtually. One is our Tessitura and web priorities group where we meet once a week

to talk through the priorities of what changes we'd like to make to the database, how we're using it, which customizations need to be made. And then we've also recently started a new weekly analytics meeting.

For those of you that know Tessatura, they recently launched a new platform called Tessitura analytics / business intelligence suite. It's built within the software, and we've been starting to roll that out, to provide training to our staff and to develop shared dashboards and widgets. So in a sort of unusual way, having this sort of time and space now, without concerts every single night, has given us the space to have the staff work on this new tool and learn it to improve our reporting capabilities.

Katherine Carleton: So it sounds as though you were already a long way down the road of building those strong communication protocols between the departments. Is it intensified through this period of time and would you ever go back to how it was before?

Ryan Lewis: I think it has intensified a little bit, but I think Dale and I really set the tone from the beginning that our departments need to work hand-in-hand, and that's how we should be working as colleagues. I've been in other companies where sometimes marketing is fighting against development. It's very siloed. You're fighting over how you're going to communicate with patrons. I come from a very opposite point of view that, even at a large institution, we have to make sure that our departments are working hand-in-hand and making sure that all of our communications are aligned and coordinated.

Dale Hedding: And one of the things this period has done: it has forced our hands on some of the things I've been talking about for the few months since I've been here. Now we just had to do them because we didn't have any other way to communicate. So we moved into more video and pushing the agenda more quickly. So in some ways, yes, I don't think we want to go back. I think this has forced us to move where we want to move.

Ryan Lewis: Dale and I are actually both relatively new to the organization. Dale started, I believe in December. I started just over a year ago and I think both of us have really tried to change the culture and the way that our departments operate because we are so large. Our departments span three different floors in our office building. So some of it, when we were in the office, was making sure that we would have face time with our other team members and making sure people visit other floors or have meetings on different floors. And now we're communicating in a very different way.

Katherine Carleton: Thank you. So I want to move onto the next question.

Q 3: ***With front line health care being - understandably - the focus of so much public and philanthropic attention, how do you make the case for your orchestra without seeming tone-deaf?***

Dale Hedding: That's a great question, Katherine. This is a serious issue for us, but I will be unapologetic in my responses here and say that there are many people for whom what we do - classical music orchestras - is one of their top three priorities. And it's our job, you know. We've got to activate this group immediately and remember to all of those other more urgent or critical issues - healthcare, hunger, homelessness, unemployment – they all have their own armies of advocates who are going to take every dollar off the table to support their efforts because they believe in them. And we are those advocates for our organizations. If we can't get people fired up and excited about what we do, who else will? So in some ways, I see this as our charge and our calling and our cause.

I believe in all those other things, but I also believe those places all have their fervent supporters and advocates as well. So we really don't need to apologize for being the best advocates for what we're doing. And I think we have to acknowledge that we know there are people who are in very bad financial situations, but there are many who are not. And there are many who care deeply about our orchestras and are fired up right now to help us ensure that the orchestras remain healthy.

We moved into this absolute cardinal rule of fundraising to 'never say no for the donor'. We really don't get to try to presuppose. They'll tell us, or there are some that you just can't go to now, but others will just tell you it's not the right time. But we're seeing such a strong response. So many want to help. It sounds a little bit cynical, but there

are a lot of people that are in this category of event or special campaign givers. And that's a nice way of saying some people like to step up in a crisis, earthquake, hurricane, etc. There are some people who see a heroic situation and want to step in and help. We have that now, so we need to find those people. I would say donors really want to hear from us now on what our biggest challenges are / honest assessments of our current situation. But very important is a forward-looking message on how their support now will help us. Where we'll solve our challenges will help us move forward to relaunching. And I love your title, Katherine, "Re-launching". You know, when we're done with this, we all need to come out of this presenting great orchestras again as quickly as possible. And so that's a good message now to take to the people.

Jeff Alexander: I might, if I may Katherine, pipe in that we should never lose sight as orchestra managers that the services that we support, services that we provide to the community, are so incredibly life enriching; and the people who experience our concerts, the concerts are very important to their lives. You all know this, but I think anytime there'd be a catastrophe, a tsunami or an earthquake or some terrible episode that happened somewhere in the world, sometimes we would feel a little guilty continuing our fundraising campaigns in that environment. But the services that we provide, the people who live in our communities, are very, very important. Concerts we can't do right now, of course, but we'll be able to again. That's such a meaningful event in their lives that, as Dale is saying, we shouldn't be shy continuing to ask these people who love our organizations and love the art form to continue to support us, not only during this time, but in particular during this time.

Katherine Carleton: So I want to move on to next question:

Q 4: ***How are you working with the CSO musicians to keep the organization viable?***

I already know that you are. I follow you on Instagram, Facebook, and Twitter, and I've seen the cat playing Bolero, with its beautiful white paws. How are you doing it? What's the process for identifying content and deciding what to share?

Ryan Lewis: It's so important for us to maintain a connection with our audiences while we can't be together at concerts. At first, I would say, it took us a while to figure out our strategy and to generate content. Everyone, including staff, musicians, everyone, was in shock and needed a few days to process what was going on in the world. There was a big concern about the content that we've created - that it needed to be at the quality level that was appropriate for our organization. We were struggling in that we didn't have permissions or the rights to share a lot of our longer-form content on social media platforms. And every day that went by on social media without new content felt like an eternity. So the marketing and communications team really had to shift gears and transition from promoting concerts to creating and promoting digital content. We reminded ourselves that this is going to be a marathon, not a sprint. So we needed to think about this carefully, be strategic about our content and develop a schedule and a cadence of how frequently we would release new videos.

We established a core digital content group acting as a liaison between our musicians and the staff. That group consists of one staff member on our PR team, one musician (a member of our flute section), and our photographer and videographer, who is an independent contractor, and the three of them have been collecting, brainstorming ideas and making it pass seamlessly between musicians and staff.

We sent out an invitation to all members of the orchestra asking them to volunteer and submit what we call DIY (doing it yourself) videos to keep our audiences connected with their artistry and creativity. We were very clear that the DIY video content would be considered for posting, but not all content submitted would appear on CSO channels, so that there was a vetting process that was very important to maintain quality control.

We also talked about how some content works better on one channel versus another. Some content was more fun in nature, or potentially it could be shared as an Instagram story, so it was more fleeting. It would only be present for 24 hours before it would come down.

We sent tips to all of our musicians about best practices for filming at your home and for even some of them, we sent them equipment to help them actually make their own recordings, like better quality microphones, and then we

assisted them with editing and polishing the footage. One important point when working with the musicians is that we asked them to select music that was in the public domain; because, otherwise, if a piece is under copyright, then we had to see permissions, which takes a long time. And, as I mentioned, at first we got off to a little bit of a slow start. But then, one musician started. He basically layered in a video of himself playing the bassoon with himself three times, and then a few musicians started the process, others kind of saw it, they felt more comfortable, and then they joined in the process.

So we launched a new campaign called 'CSO from home' as videos have been rolling out over time. And we've seen some incredible results on Facebook. Some of the videos that we've launched have seen incredible stats. The top performing one right now is a video of our assistant principal cello Kenneth Olsen accompanied by Craig Terry on the piano performing an arrangement of Leonard Cohen's Hallelujah for cello and piano.

And that video was posted, I think on April 5th. That video since April 5th has reached almost 7.3 million people on Facebook. And it, has had over 3.1 million three-second video views and over 681,000 engagements. That video is now the number one performing video of all time on our social media properties. We were blown away in its success and how it took off like wildfire and was shared by so many different people and organizations on Facebook. And when we looked at our Facebook insights, our stats, over the past 28 days, we've been able to, with this new content, reach 10.9 million people on Facebook.

Our posts: we've had engagement with 1.6 million people, over 5 million video views, and we've increased the followers on our page by almost 900% in the past 28 days. When we looked at our Facebook data from the past quarter, we typically run organic and paid campaigns, and usually our organic posts don't go very far. But with this new type of content, because it is resonating so well, it has blown our Facebook stats out of the water, and our organic content is reaching more people than ever before. And this is helping us stay connected with audiences and build a fan base, worldwide, that both inspires philanthropy and affiliation with the organization and hopefully will generate a new base of ticket buyers to come back once we're back on stage.

We've tried a couple of other initiatives on social media to stake audiences: one is we've tested out a new thing called Facebook Premiere, which some of you might be familiar with. It's similar to Facebook Live, but instead of airing a live video, you can actually air a pre-recorded video at a particular date and time. This past Easter Sunday, we aired a video of Maestro Muti conducting Beethoven's Ninth Symphony. The concert was actually recorded in September 2014, but we premiered it on Facebook for the first time on Sunday. That video had already been in our YouTube channel and has been seen by over 21 million people. What's unique about a Facebook Premier event is that it can create a community experience. Everyone as they watch along with the video can react to it, and then there's a chat feed where everyone could chat while they're watching the video. And we have so many people watching from all over the world. We actually participated in the chat both by providing commentary of program notes throughout the broadcast and appeals to support the CSO.

In addition to that, our Civic Orchestra of Chicago, our training orchestra, was supposed to celebrate their 100th anniversary on March 29th live in a concert at Orchestra Hall. But because that concert could not take place, instead we planned a virtual concert and we filmed over 60 of those civic musicians. They actually filmed themselves individually playing excerpts of a Tchaikovsky symphony, and then we layered all those videos together to create a virtual symphony.

And you can do that on social media channels and on YouTube as well. A major difficulty that we're facing in terms of content is that, as I mentioned, we don't have the rights to share materials from our archives, which is why we don't have more full-length content. And that's something that we're negotiating right now with the national union.

But as I said, we've seen incredible results on Facebook. Instagram is growing like crazy, and then we're piping out all this content for people who might not follow us on social media through a weekly email. So every Thursday we're sending a weekly digest, a content roundup email of all the new things that we're launching, and that's going to our full email database.

In addition to that, we launched a new radio broadcast series in Chicago that's airing locally on WFMT, which is our great classical music radio station partner here in Chicago. It's a new series that airs on Tuesday night, and it's from the archives. Maestro's Choice, in which Maestro Riccardo Muti, who is home in Ravenna, Italy right now, personally selected six programs that are airing locally on the radio, and you can listen to those on demand as well. So while we can't be together in Orchestra Hall, we're providing ways both on the radio and online for our audiences to come together and to connect around a shared musical experience.

Katherine Carleton: That's great. Now that you've seen the kind of impact that content of various levels of seriousness and various levels of intimate secrets of the CSO musicians, will it affect your content strategy moving forward?

Ryan Lewis: I definitely think it will because I think the videos that we're seeing now, you really develop a personal connection with the musicians and that's something that we really want to continue.

The one thing I think we'll definitely want to change is thinking about our staff structure and the way our team is set up to create and to disseminate this content. So that's something I was thinking about before the coronavirus hit. And I'm thinking about it even more now that we need to have our team more aligned to produce this type of content and to reach people in a digital space.

Katherine Carleton: Well, the cool thing is that there are orchestras right across Canada that are reaching this similar conclusion. The re-skilling in a very short period of time has been pretty spectacular to observe. So I want to ask the learning question:

Q 5: ***What are you learning along the way and what has surprised you about any of the things that have gone on since you first learned that putting on public concerts at the hall would not be an option?***

Dale Hedding: This ties into what we were talking about a little bit as well. You know, I think we all often worry about our patrons or donors disengaging or, worse yet, unsubscribing from emails or social media channels. One thing that's been really interesting that we've learned here is that patrons' thresholds for what is constitutes too much information is much higher than it was before the shutdown period. In fact, they're often responding to us 'you cannot communicate enough with us'. They comment that they've seen every little piece, every cat POV video, the concerts, the video series. And they want more. So open rates for emails are much higher with continued requests for more things. And again, this is partly a product of people being at home a lot more of the time, but they pretty much have given us a free pass on the too much nudging and being annoying. And we are jumping on that opportunity.

One example that ties to what you were talking about just before - things we've learned that we don't want to give up going forward. Our Civic Orchestra that you just heard about, our professional training orchestra - rather than sending out the normal, handwritten note cards to all of their scholarship donors that we have them do each year, we gave all of them the task this year of making a short little video with some parameters: a little message specifically to the people that sponsored you and what you're doing. Talk about how you're pulling up here in the interim and then just play a few seconds of something. So I just got yesterday this whole raft of these videos that the gift officers are going to send out to their donors. It's moving. I mean, I almost got teary. Because these are just kids in their little apartments, in their Civic Orchestra sweatshirts, and they're just talking and playing to these donors. These are going to be priceless to these donors, so I don't ever want to go back on this one. They're wired to do it. Our professional players can do this.

So that's just a good example of the kind of things we want to keep doing in our learning. And also, one thing I think I'm learning in my team. Normally, you know, you have to be careful with how much information flows around a large institution. But we're having to, in this quick pace mode, we're in with our new crisis messaging kit. I'm having to share more information with my team at all levels, but make sure we all understand the right levels of discretion. I want them to have hard facts to share with particular large donors or institutional donors. They would appreciate really detailed insider information and finances, but then not broadcast that in more general vehicles we use. So teaching and learning with each other, trust and discretion with sensitive information has also proved really effective.

Ryan Lewis: I think something that we've been dealing with, and that's been surprising to us, is how to deal with uncertainty, the uncertainty of when we'll be back on stage, how long concerts will be cancelled.

We issued our first cancellation on March 12th, I think it was a Thursday night. We were scheduled to have a concert that evening at eight o'clock. And it was sold out and we were at five o'clock, all gathered in a conference room watching a press conference with our governor and mayor. And at five o'clock, they basically said that they were going to be mandating a ban on public gatherings. We had one hour to issue a cancellation and to notify patrons that were coming to the Hall that night and amazed when we got the word out. And only a few people made it to the Hall that evening. But, since then, we've had a stay-at-home order issued through to April 30th, and we expect that that will be extended past that date.

So our team has had to really adjust to figure out what do we do: do we pull our advertising campaigns? do we work ahead? should we be marketing future concerts, or adjusting, as I said, to try to promote digital content? and what are we going to do with our subscription campaigns? Looking at our results, our subscription numbers are significantly behind where they need to be at this point in the campaign.

And what was surprising is that our patrons weren't responding to us right away after we issued concert cancellations. In the past we've had patrons call us and our phones are ringing off the hook. People want to know what to do with their tickets. But this year it was eerily quiet. And, as I talked about earlier, we gave our patrons options of what they would like to do with their tickets. So far, the patrons that we have not yet heard from earlier this week, we launched a new web form which sends patrons an email and encourages them to consider converting the value of their tickets into a donation to the organization. Even though we would lose it as earned revenue, it would stay with the company as a contribution and stay in this fiscal year. So we sent an email to those patrons; in two days, they went to a survey web form to fill out options that then connected back into their account and Tessitura. And in two days we had an overwhelming response, and 44% of those respondents said they would consider making a donation to the company. So we were really surprised and blessed by the generosity of those patrons.

One other thing that we've been having to adjust with is our use of technology. I talked about earlier how we're all using Teams and Zoom now, but we were a company that still had old telephones in our office. We were working on a plan to migrate all of our telecom systems into the cloud. That wasn't yet done. Luckily, the marketing team was like a guinea pig, and we had moved all of our files from shared drives into the Microsoft cloud. It just makes working remotely much, much easier, so we were very thankful that we had done that using SharePoint One Drive. But a big adjustment was also with our sales and ticketing staff. Our box office and our phone room had to figure out how to operate remotely and how our individual callers could accept patron phone calls from their homes, making sure that they all had secure internet connections. They could answer a phone call, access Tessitura, and potentially take credit card information. So we had a lot of conversations about security, PCI compliance and so on and so forth.

Katherine Carleton: Okay. Jeff, have you had any surprises?

Jeff Alexander: Yes, I think the biggest surprise has been the renewed positive relationship with the members of the orchestra. Every orchestral institution has a different relationship with its musicians. We all try to make those relationships positive, and in some orchestras they're more positive than others. The tradition here in Chicago has been a pretty rough relationship over the past 80 years or more, and it was rough last year with the strike. But I think that if there's a positive that's coming out of all of this, it's the fact that the musicians feel as though (they might have felt it before, but they never said it) … now they're saying how much they appreciate what the trustees and the staff are doing for them and how we're all cooperating with each other. So that's been a nice surprise to come out of this, and I think that will carry forward as well once this is all over. I've not been surprised at how wonderful the staff has been and how they've, as I said before, risen to the occasion. The trustees are a little quieter than I think I expected them to be. I'm sure they're all dealing with their own personal experiences and their own personal finances. But in fact I'd rather have it that way than to have them meddling in the details too much. So, I guess the biggest surprise is the improved relationship with the orchestra.

Katherine Carleton: I'd like to roll onto the last prepared question now if I may and talk about staffing strategies.

Q 6: ***Some Canadian orchestras have kept staff on, in some cases at reduced wages; others have laid off staff and are contemplating bringing team members back as government programs kick in. What has the CSO's approach been overall, with specific reference to the development and marketing teams?***

Jeff Alexander: I'll talk to this a bit, but there's nothing different that we've done with the development and marketing team than we've done with everybody else. Ryan mentioned that on March 12th, we had a very short period of time to deal with a cancelled concert. And the initial mandate from the mayor that night and the governor was a 30-day a ban on large public gatherings.

I quickly consulted with our board chair, and you know, on March 12th we were all, at least I was, certainly far more naive about what was to come. And we thought that a 30-day ban on public gatherings would probably be the extent of it. So I had a quick conversation with our chair and we agreed that I would send a message to the orchestra telling them not to come to the Hall that night and that the concerts will be canceled for the next 30 days. Within that message, to give them some comfort, I added that we would sustain their compensation and benefits at 100% during the period. I sent a similar message to the staff, and there are a lot of people involved: the staff, the chorus, the orchestra, the civic orchestra, the ushers (since we own and operate our hall, these are all our employees). And then about three days later, the governor extended that mandate to an eight-week ban, which goes through to May 10th. Then we started thinking, my goodness, can we really sustain this at 100% for such a long time and perhaps longer? So we did a financial analysis of how large a deficit we would have if we sustained everybody at 100% through to May 10th and if we sustained everybody at 100% through to the end of our fiscal year, which is June 30th. Those numbers are staggering, so we put a few concepts together for the executive committee of the board to consider, which included: (1) our recommendation that we reduce compensation to the orchestra by 20%, same for all of the other people I've described (the senior managers), but then on a sliding scale for the rest of the staff from 15% to 5%.

The interesting part with the orchestra is that there's a force majeure clause in our contract with them. We could have just said, 'sorry, we're not going to pay you anything', and we would have been within our legal rights. But the executive committee contemplated what we were proposing to them and they accepted it, so we are currently sustaining all of our full-time employees at basically an 80% level.

At the end of this month, we'll be furloughing most of our part-time people, which includes our ushering staff. We also, in the agreement with the orchestra, made it clear that we could sustain this through to the end of June. There might have to be further reductions beginning in July, depending on what happens with the summer season. So that's where we are right now.

Not every organization is in a position to do this. It's clear we're going to have a multimillion dollar deficit at the end of this year. Fortunately, we have enough cash reserves to cover that. I know there are other US orchestras that have already laid everybody off, others that have made slightly deeper cuts than that, and others that haven't made any cuts because they have enough of a cash reserve. So it depends on your cash reserve, on your line of credit. No-one wants to go into endowment funds for this. So I think that the tougher question will come in July and an even tougher question will come in September if we're unable to present concerts then.

Katherine Carleton: I think everyone on the call today understands what you're going through and is doing similar math. People feel very responsible for the organizations whose health and artists they steward. And I think this has been a tremendously challenging time for all.

What I would like to do at this point is roll over into the chat box and see what we've turned up by way of questions.

Chat Box Questions

Q: What proofing system are you using? The writer is currently evaluating a few options and is curious as to what CFO is finding useful.

Ryan Lewis: We're using software called Workfront, the proofing software that used to be called Proof HQ, but it was absorbed by Workfront, project management software.

Q in response to Dale's comment about those patrons who are the ones who want to step up and help in a crisis: Knowing that that is who we should work to reach is good, but how do we actually identify them?

Dale Hedding: If you know them specifically within your major gift prospecting work, that's helpful, but you obviously aren't going to know a lot of those. You're simply going to have to take some leaps of faith and send donor messaging that reflects optimism that they will step up. Don't worry about offending the ones where this isn't the right time. They'll tell you or they'll ignore – they won't be offended that you asked at all. But I think you need to put messages out that suggest you are profiling who these people are. Tailor messages to them as a group, and these people will step up. It's all in the messaging. Don't be apologetic. Don't assume that you're trying to find that 10 or 20 or 30 or 40% of people that really are looking for a way to help cause they love your orchestras and ignore everyone else.

Q re. asking and pitching your organization within the maelstrom of need in our communities right now: Is there a place for us as orchestras to advocate for others, helping to demonstrate our place in the wider community during a time of need and crisis?

Dale Hedding: Already just in Chicago, in Illinois, there's this Arts Illinois group. A couple of different groups, the foundation communities in particular, have really come together to create community-wide initiatives. They're much better equipped to do that, so I think partnering up with places like that that where there are funders already and also have access to civic leadership can help drive a bigger purpose and much larger resources. That's where to go for that, I think. Again, I think you really do need to focus hard on advocating just to your community and partnering with these other places as they prepare this.

It's hard to drive that, particularly in the arts community. And one of the things I'll tell you that we found locally: the arts initiatives that have emerged have been focused on very small grassroots arts organizations, even though they were devised under the pretense of supporting the larger arts organizations that drive economic impact in our communities. But the funding is almost all going to very grassroots organizations and artists. So a lot of dissonance going on there right now in so many of these initiatives.

Q: Are you concerned that your patrons will be uncomfortable about coming back to the concert hall, and how will you sustain your moment and the organization revenue stream if no one comes, even if you are permitted to open the doors again to the Hall? How are you thinking about that from a planning perspective and also from a messaging perspective?

Dale Hedding: I think we'll let Jeff answer this one, but I think we have all agreed that doing endless cat videos is probably not going to be a long-term solution.

Jeff Alexander: That's right. We are thinking about that. We don't have the answer, and of course nobody has the answer. And frankly we're just trying to get through the current period right now. We've had some internal discussions about what we might do starting in the fall, but I think we all have to be prepared. We're not prepared sitting here today, but we have to figure out how to be prepared. And I know for many Canadian orchestras, like many US orchestras, the concert season would have been ending around now anyway, or mid-May. Ours happens to go until the end of June. Maybe we could still get a couple of weeks of concerts in the end of June, although that's becoming less and less likely. But yes, what will we do if we're allowed to put concerts on again starting in September and we only get 25% of ticket sales that we would typically get? I think that will be our next major decision, how can we possibly financially sustain that? I think the question is how long do we think that will last? And you know, it won't last forever. I think we have to keep that in mind. There will come a time when a vaccine is

invented. There will come a time when it will be perfectly safe together in large crowds again. The challenge, and where we have to be strategic in our thinking and in our actions, is how do we survive to that point? Is it holding on for another three or four months, or is it holding on for another 18 months? And if it's the latter, we just have to think about how we can do that at. For each organization it will be different.

Katherine Carleton: This has been truly a stunning and generous 60 minutes of a call and response, deep thought, and a lot of inspiration. And I'm so grateful to you, Jeff, for responding positively in the first place. To have a chance to meet Ryan and Dale as well at a time like this one is a pretty amazing trio. So thank you to the team from the Chicago Symphony Orchestra. Know that we're sending you all our best and that we're very grateful to you.