

THANK YOU FOR YOUR INTEREST IN SHARING THE STORY OF PORTLAND OPERA!

In this brief, we've compiled some FAQs about Portland Opera, our community programs, our strategic progress, and COVID-19 impacts.

Video and photography are available upon request.

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VISION

We celebrate the power of performance, storytelling, and song as an inclusive artistic leader.

MISSION

We gather and inspire audiences, artists, and collaborators to create shared opera experiences that enliven and connect us all, enhancing the cultural landscape of the beautiful Pacific Northwest.

VALUES

We realize our mission and vision with a constellation of values that guide our work:

THE ART OF OPERA

We are unapologetically passionate about the live art of opera, and are energized by its roots as the people's art form. We believe in its future. We continue the timeless tradition of storytelling, we celebrate the universal language of music, and we honor the brilliance of the human voice.

ENSEMBLE & CULTURAL EQUITY

Our work relies on being an ensemble, and our ensemble only thrives with diversity, equity, inclusion, and respect. We commit to actively confronting and dismantling white supremacy, patriarchy, and exclusion in our company, field, and community. We commit to being inclusive and strive every day to be an anti-racist organization.

OUR SHARED HUMANITY

We sing stories about experiences, emotions, and moments that matter in life. In this practice we, together with audiences, aim to reveal and gain insight into the human condition—as a reflection of ourselves, and ourselves in relation to each other.

FISCAL STRENGTH & STEWARDSHIP

We are committed to the fiscal health of our organization, and its bright future. We are dedicated financial stewards of the community and the philanthropic funding that makes our work possible.

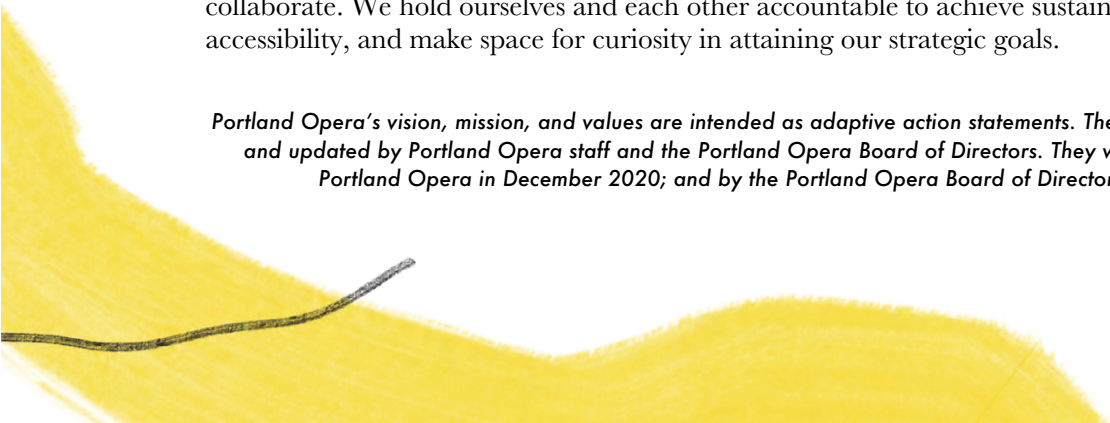
COMMUNITY CONNECTIONS

We generate positive impacts for our community, fostering and co-authoring collaborations and programs to achieve meaningful engagement. We contribute to the civic and cultural life of our region, and amplify the contributions and insights of our peers, colleagues, and partners.

IMAGINATION & THE ENTREPRENEURIAL SPIRIT

We accomplish our work with an enthusiasm to be creative, to innovate and transform, to adapt and collaborate. We hold ourselves and each other accountable to achieve sustainability, increase accessibility, and make space for curiosity in attaining our strategic goals.

Portland Opera's vision, mission, and values are intended as adaptive action statements. They may be revised, augmented, and updated by Portland Opera staff and the Portland Opera Board of Directors. They were adopted by the staff of Portland Opera in December 2020; and by the Portland Opera Board of Directors in February 2021.





**Our work
relies on being
an ensemble.**

[Learn more about the
people who power
Portland Opera.](#)



MEET OUR ENSEMBLE

Above: Artistic Director Priti Gandhi, who joined the company in 2021, with executive leader, General Director Sue Dixon.

Left, from the top: Damien Geter, interim Music Director and Artistic Advisor, since 2020; Bill Sweat, President of the Portland Opera Board of Directors and Proprietor/Winegrower, Winderlea; and Soprano Karen Slack, Artistic Advisor, who joined the company in 2020.

PORTLAND OPERA



Portland Opera Resident Artists 2020/21: Photos by Gia Goodrich | VEV Studios



MENTORSHIP & THE FUTURE

PORTLAND OPERA RESIDENT & YOUNG ARTISTS PROGRAMS

Portland Opera's Resident Artist program was established in 2005 to provide a bridge from the music conservatory world to the professional opera stage. Admissions are highly competitive for this program, which serves as an intensive residency and training program. Participating artists appear in opera productions, and perform free and public recitals, in addition to other community engagement performances. Program alumni perform with opera's leading companies and have won some of the industry's most prestigious competitions—including the Metropolitan Opera National Council Auditions.

THE 20/21 RESIDENT ARTISTS



(in order of vocal range; pictured from the top)



LYNNESHA CRUMP, soprano; JASMINE JOHNSON, mezzo-soprano; DAVID MORGANS SANCHEZ, tenor; MICHAEL PARHAM, baritone; and EDWIN JHAMAL DAVIS, bass.



In 2021, Portland Opera expanded the coaching staff and faculty for the Resident Artist Program, and hosted resident artists in a “pod” during COVID-19. Upon completion of the program, Portland Opera paused the residency in order to examine the experience through the lens of transformational change for our field, and to align the program with strategic planning goals, while welcoming new artistic director Priti Grandhi to the company. Currently, we are reimagining this program, and plan to welcome our next slate of artists in fall of 2022.



“Being an Ensemble Leaders Fellow has given me the opportunity to be more involved with the administrative side of the company, and the creative process of putting together an opera. This fellowship has not only enhanced my leadership skills, but it has also given insight and true understanding into what it means to be an administrator and artist, and not just a singer.”

Jasmine Johnson, *Portland Opera’s inaugural Fellow*

Internships & Learning

Ongoing learning opportunities continue throughout each season in the form of production, artistic and administrative internships; as well as Master Class opportunities with leading guest artists. Recent opportunities included an External Affairs internship during the 20-21 season with University of Portland, and a Master Class at Portland State University with soprano Alexandra LoBianco (Tosca).

Ensemble Leaders Fellowship Program

In 2021, Portland Opera is launched the Ensemble Leaders Fellowship—a new program to move our art form forward by providing career advancement opportunities for individuals who have been historically underrepresented in the world of opera, in both administrative and artistic roles.

There are significant inequities for people of color in the classical music field, and the reliance on unpaid internships keeps many people of color from pursuing those careers. We want to change that. We plan to offer paid fellowships for emerging BIPOC professionals who want hands-on training and learning opportunities in the fields of production, public relations, fundraising, artistic, and community building. This program will offer mentorship and professional development opportunities, working directly with each department head and will include attending OPERA America conferences, Association of Fundraising workshops and seminars, as well as National Arts Marketing conferences. The fellows will have access to “behind-the-scenes” shadowing and learning about production and professional development conferences.

As the initial pilot year of this program comes to an end, the company is working towards expanding the fully-operational program by the 2023-24 season. Portland Opera’s leadership and staff looks forward to the possibilities this program will create for the BIPOC community and are inspired by the leadership and experiences of Jasmine Johnson.

PORTLAND OPERA

22/23 BOARD OF DIRECTORS

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PORTLAND OPERA TO GO

For over two decades, Portland Opera to Go (or POGO) has shared inclusive arts experiences with students, educators, and community members around the region. In a typical school year, our POGO company members travel over 5,000 miles, to connect with approximately 13,000 K-12 students. Performances happen in school gyms, libraries, cafeterias, classrooms, and community centers—all with full costumes and portable scenery. Integrated in-class workshops and teacher's guides, highlighting curricular connections aligned to state curriculum standards, are available each year. To date, the program has shared opera with more than 275,000 student and community audience members living in Oregon, southwest Washington, northern California, western Idaho, and northern Nevada—with a focus on visiting schools with barriers to accessing the arts.

WINTER 2022 TOUR UPDATE

In light of Covid case counts fluctuating by county statewide, the company is presenting a shorter tour of Portland Opera to Go throughout winter 2022, in order to ensure the health and safety of artists, students, and staff. The 2022 tour is a bilingual English/Spanish production of Hector Armiento's *Un Camino de Fe / A Journey of Faith* celebrates about one family's immigration story from Mexico to the U.S., and is geared at middle grade students. For schools we are unable to visit in person due to high case counts in the community, we will provide digital access to video of the opera.

OPERA ELEMENTS

In response to the pandemic, Portland Opera partnered with Portland Public Schools to create Opera Elements, a series of three virtual lesson plans with activities for students. Made up of both synchronous and asynchronous activities, these lesson plans focus on three main topics: the voice, the building blocks of opera, and composing. Students have the opportunity to engage with the Portland Opera Resident Artists and company members, including composer Damien Geter, Portland Opera's Co-Artistic Advisor.

"It never ceases to amaze me how well the children engage [with POGO]... By allowing children to interact, you give them a voice." – an educator from Ontario, Oregon



WORLD PREMIERE

FALL, 2022

"We shall rather turn our attention to the program of the future...in order that the work of those pioneers in the cause of freedom will not have been in vain."
Beatrice Morrow Cannady, in a speech at the 1928 conference in Los Angeles.

Portland Opera is thrilled to announce the creation of a new opera by composer Dave Ragland and librettist Mary McCallum for the fall 2022 Portland Opera to Go tour. *Beatrice*, a 50-minute commission is inspired by the life and story of Beatrice Morrow Cannady, a prominent leader in Oregon's cultural community and civil rights movement of the early 1900s. The piece went through a workshop process with the community in March and April of 2022, will undergo further development, and will then tour schools throughout the state and region this fall. The work is being written for middle grade audiences, focused on fourth through ninth grades.

"I am honored to take part in the creation of an opera based upon the life of Beatrice Morrow Cannady. Her story is a dynamic demonstration of vision, determination, activism, and community mindfulness. Her life's work is a component of Black history that needs to be told," says composer **Dave Ragland**. "I firmly believe that opera is for everyone. I am elated that Portland Opera is taking initiative to create and produce operatic programming that effectuates community education. I hope that the students and adults who see the show are both entertained and inspired to make an impact in their respective communities."

This opera is part of a multi-year project to commission original operas highlighting the experiences of Oregonians and will be followed by operas about Asian and Pacific Islander and Native American communities. All will be developed with K-12 schools and communities in mind and toured throughout the state and region in subsequent years.

PORTLAND OPERA



OPERA *a la Cart*

Photos courtesy of Portland Opera and Human Solutions

Inspired by Portland's food cart culture, Opera a la Cart is a mobile music venue that brings live opera performances to places where people gather.

Opera a la Cart reaches more than 30,000 people throughout the summer months, at free pop-up performances, farmers markets, city parks, neighborhood festivals, vineyards and wineries, street fairs, and other public events throughout the region.

Designed and built as a collaboration between Portland Opera's production team and architecture students from Portland State University, the cart features a fold out stage and a "menu" of operatic specials of the day. Opera singers sing some of the most beloved songs from opera and musical theatre—including arias, duets, and ensemble pieces.

Last season, the ensemble of singers, musicians, and technicians who are featured with Opera a la Cart are following guidance from Portland Opera's team of medical advisors and production staff, to share beautiful music when, where, and how it is safe to do. For summer of 2022, we are thrilled to be back out at community gatherings and events!

PORTLAND OPERA



Strategic Progress During COVID-19

As Portland Opera continues to ramp out of COVID-19 impacts, we reflect on the meaningful changes that we have accomplished during this time. Here are some highlights of our fundamental progress:

CULTURAL EQUITY

In 2019, the company began work with Keryl McCord, and her firm Equity Quotient, to hold learning labs and retreats regarding racism and cultural equity at Portland Opera. After initial discovery sessions, a staff and board working group identified recommendations for change and accountability, and developed an Equity Financial and Strategic lens framework for the company. In addition, a company-wide assessment helped identify challenges and opportunities for change. Work, progress, and integrations continue in our next phase of transformation.

ARTISTIC PLANNING

Following the North Star of our Strategic Plan, the company has been building ensemble, transforming workflows, and laying the foundation for new community partnerships, artistic partnerships, reimagined public programming and engagement.

OUR MISSION, VISION & VALUES

The staff, board, and company members of Portland Opera have successfully completed an inclusive process to update our mission, vision, values, and company identity—in order to strengthen our value to the community and region that we serve, and to align our vision for the future with community-centered full-company activations.

OPERATIONAL INVESTMENTS

We used the time away from the stage to invest in technology, systems, and training that increases our capacity across numerous departments. We converted the Hampton Opera Center to a digital studio, in accordance with a team of medical experts, and have pivoted to present free digital and safe community programming in non-traditional ways. In addition, we launched a new CRM, created and built a new website, and launched new artistic database systems.

*We've been busy making progress with our strategic plan benchmarks.
Visit portlandopera.org/strategic-plan for more information and details.*

PORTLAND OPERA

EQUITY, DIVERSITY & INCLUSION Our Journey So Far | Our Next Steps

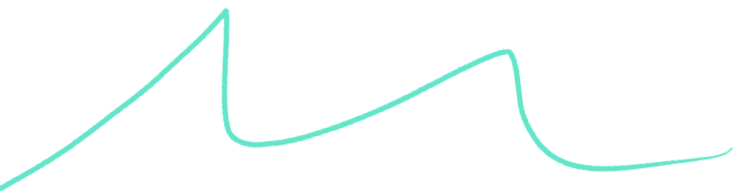
Memo from Sue Dixon, General Director & David Salerno Owens, Portland Opera Board Member, Chair of Cultural Equity Planning Committee, February 2022

Background: During the 18/19 season, the Portland Opera Board of Directors and Metropolitan Group led the company through the process of creating a strategic plan for the company, resulting in an exciting set of ideas for Portland Opera's next chapter. Strategy Three of the plan specifically outlined fundamental progress to activate an organizational commitment to equity, diversity and inclusion, in order to create the opera of the future. However, our journey and outcomes with this work impacts every strategy outlined in the plan: from our mission, vision, and values articulations, to our civic practice, community connections, and more.

In the two plus years since developing our goals, we've pursued change and began our journey to transform our company. We are a long way from the finish line, but this recap outlines our progress so far (some of which happened concurrently).

1. Find an accountability partner and begin with education.

- a. Through our extended network, we were introduced to Keryl McCord and her company, Equity Quotient.
 - i. In 2019 we established a staff working committee for the first scope of work with Keryl: a 2-day learning lab for staff members about the genesis of race and dismantling privilege; and a one-day board retreat. These workshops resulted in shared vocabulary, learning, and the initial synthesis of our challenges (and solutions) as a company.
- b. During this time we also began work with an agency to lead us through the process of refreshing our mission, vision, values, and brand platform.
 - i. The conversations intersected, and the process unfolded in surprising ways as we navigated COVID-19 and national civil unrest (along with local civic demonstrations) with increased intensity for the Black Lives Matter movement.
- c. This process clarified immediate actions that we could take as a company in order to begin our transformation.
 - i. This immediate impact meant action within our ongoing future season planning process, our community programs, the creation of artistic advisor roles, and our COVID-19 programming.



2. Find a path forward for staff and board to build sustainable and institutionalized change together.

- a. As a result of our initial learning labs, we developed a staff and board member working group for 2021 that met every other week. This group was charged with developing a Cultural Equity Plan for Portland Opera, in consultation with ongoing work with Equity Quotient.
 - i. The process included three subcommittees: one focused on Governance, Practices, and Policies; one focused on general Company Culture; and one focused on Artistic and Production/Programming.
 - ii. Every department is included, with various levels of management.
 - iii. In addition to the focus on the Cultural Equity Plan, this group served as the go-to committee for other conversations and connections: including the Black Opera Alliance pledge, We See You White American Theatre, and our brand platform work.
 - iv. There were two key accomplishments of this working groups: the first was the development of an Equity, Financial and Strategic Lens (EFS lens) for all company members to utilize in policy decisions and institutional leadership; the second was a set of 85 recommendations and commitments for change, identified within each working group. In addition, this group established a set of meeting agreements as a tool for all company meetings and conversations.
- b. When our vision, mission, and values statements were being refined for adoption, the committee worked to edit and build consensus around our core value of Cultural Equity and Ensemble. This value will be part of our brand platform launch in March and was developed by the committee.
 - i. These articulations were sent to external stakeholders, community members, orchestra and chorus, full staff, and board for evaluation and consideration.
 - ii. The staff voted to adopt them in December of 2020; the Board of Directors adopted them at their meeting in February, 2021.
 - iii. These articulations will be made public in March.
- c. We also connected our brand agency with Equity Quotient for feedback in terms of brand equity; so, there was no progress without consensus that our commitment (as it comes into focus) is part of every aspect of who we are and what our goals are in the community.
- d. Next: Equity Quotient will continue to work with our board/staff committee to refine our recommendations, test them into a draft of our Cultural Equity plan, and then put forward a public Cultural Equity Plan for Portland Opera for consideration, refinement, and adoption by the staff and board of directors (target: June, 2021)

3. Continue to be guided by expertise and accountability.

- a. In order to base our Cultural Equity Plan in data and not assumptions, the staff/board committee worked with Equity Quotient to adapt and execute a company-wide assessment tool to help us gain insight into our biggest pain points and roadblocks with this work. The 25-minute survey was shared with orchestra, chorus, stagehands, production company members, the full staff, and the full board, and helped management identify strengths, weaknesses, opportunities and threats in our progress towards organizational transformation.
 - i. As a result of this assessment, the board and staff working group paused their regular bi-monthly meetings in order for progress to shift towards departmental work and progress.
 - ii. In our departmental endeavors, we are transiting accountability to live with every member of the team, and not just committee members.
- b. Portland Opera continues its third scope of work with Equity Quotient, with a focus on accountability, integrated workflows, and strategic change.
 - i. To date, the EFS lens has been activated by all departments and executive leadership, impacting the rewriting of Portland Opera's bylaws, hiring and retention policies, employee orientation and ongoing learning, gift acceptance policy, donor benefits, ticketing policies, season selection, company creation, and much more.

Our work in bringing cultural equity to Portland Opera is certainly not complete, but we continue to empower staff and board members alike to create the Portland Opera of the future. We remain focused on creating sustained programs and programming that will reflect our commitment to cultural equity, our values as we strive to dismantle the patriarchy in our company, field, and community; and our aim of striving, every day, to be an anti-racist and inclusive organization.



Sue Dixon

General Director, Portland Opera



David Salerno Owens

*Portland Opera Board of Directors &
Committee Chair, Cultural Equity Planning*

PORTLAND OPERA

FIVE YEAR STRATEGIC PLAN

FY 2020–2024

In September 2018, Metropolitan Group was contracted to develop a strategic plan for Portland Opera. Portland Opera has been part of the community since its founding in 1964. It has seen many ups and downs, and changes, and remains a cornerstone of the arts and cultural landscape in Oregon.

We learned that the organization has faced operating shortfalls for the past several years. Cumulative operating cash flow losses since the FY 2015–16 change to a summer season could result in the opera drawing down its endowment completely in seven years if decisive action is not taken now.

We also discovered multifaceted solutions and organization-wide strategies to make improvements.

Staff and Board members felt strongly that their voices needed to be heard throughout this process. We designed an approach to give adequate space for this while seeking new ideas and perspectives. Following a review of existing research, reports, literature, and assessments from Portland Opera, we implemented a research phase that engaged internal and external stakeholders, including subscribers, funders, partners, businesses, and other admired arts organizations in Portland and other markets across the country, to solicit their input on the areas of opportunity they felt that Portland Opera should pursue. We also engaged with OPERA America (the national opera service organization) to provide a larger regional perspective.

We presented our research findings and recommendations to the Board's Strategic Planning Committee and executive staff over the course of the 18/19 season. Our thinking and strategies reflect input from the strategic planning committee, as well as Portland Opera staff and other local and national experts.

This plan includes three interrelated strategies, starting with the concepts that will have the fastest impact. Metropolitan Group believes that if Portland Opera just implemented strategies one and three, Portland Opera could extend its financial viability by a number of years. However, the ceiling to truly grow and serve the community will be limited, and the ability to create a sustainable operating model and the size and diversity of a support-base needed is less likely without strategy two. Strategy two includes larger longer-term strategies (beyond the five-year duration of this plan), that could catapult Portland Opera into a new level of community connection and leadership. Patience, flexibility, collaboration, and shared determinations will be vital to achieving the fullest potential of this plan.

–Metropolitan Group

SUMMARY

Portland Opera | Strategic Plan

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**PORTLAND
OPERA**

Strategy One: Immediate Impact – Patron Experience

Our first category contains relatively short-term actions that Portland Opera can take to align more closely with patron and community feedback, and impact revenue.

Specific actions to take in this strategy:

- Move back to a fall–spring primary schedule, starting with the 20/21 season, in response to overwhelming community, audience, and patron feedback; collaborate with chorus and orchestra members to determine how this will work.
- Adopt a venue mix that reflects the desire for both grand and intimate experiences while improving the annual performance gross margin, and continue to present repertoire that balances classic and contemporary work.
- Invest in technology and systems in order to build clearer paths for ticketing and donation operations and company functionality.

Strategy Two: Positioning Portland Opera for the Future

The next strategy in this plan is part of a vision down payment for the future.

The first set of actions is around amplifying the Portland in Portland Opera:

- Transform and define an artistic point of view that is a reflection of community, through production and ancillary programming choices that celebrate classic and contemporary works.
- Curate collaborations or commissions that harness the creativity and spirit that is unique to this place.
- Explore different opera experiences that may serve new and existing audiences in new ways, while continuing to honor the traditional repertoire that our art form is built upon.

The second big strategy in this section is exploring a longer term vision and feasibility to redevelop the Central Eastside waterfront property that Portland Opera owns, through opportunities that could mutually benefit Portland Opera, other arts organizations, and the entire community.

Strategy Three: Fundamental Progress

The final set of strategies are closely linked to the success of the first two strategies, and strengthen the organization by building on our existing efforts to connect with the community and deepening these relationships.

Specific steps in this category include:

- Strengthen connection to the community. This might mean:
 - Developing new methods of volunteerism, and sharing a more active role in support of other community organizations and causes.
 - Bringing opera experiences into unexpected places to meet people where they are, and continuing to break down barriers to experiencing the beauty and breadth of the art of opera—and its power to inspire our imaginations and change our lives.
 - Exploring enhanced civic, social, and artistic practices.
- Update Portland Opera's mission, vision, values and brand identity to better reflect the work of the entire organization.
- Activate an organizational commitment to equity, diversity & inclusion—in order to create the opera, and the Portland Opera, of the future.

Metropolitan Group believes that these three interrelated strategies will lead Portland Opera down a path of growth, service to the community, national prominence, and enhanced financial stability. The elements of each strategy will require time, effort, collaboration, and investment to evaluate and pursue, and the details of the strategies should be modified over time as progress towards their goals is measured. Growth will require ongoing attention, but Metropolitan Group believes if these strategies are followed, Portland Opera will be a major artistic leader for the community for many years to come.

The leadership team of Portland Opera is so grateful to the board members, staff members, artists, musicians, community members, patrons, movers and shakers, and everyone who shared feedback about where we've been as an organization, and where we're headed. Our plan is to build upon the successes that we've already created together, while adjusting course to align with patron and stakeholder feedback. We are inspired by the exciting thinking and ideas that forged this plan. We look forward to creating a more sustainable financial path forward so that we can continue to serve the community for decades to come.

Portland Opera's commitment while we embark on this work is simple: we will continue to listen to the community and artistic voices that remain at the heart of our future. We are a company that belongs to this amazing community, and we intend to grow.

For more information, please contact
press@portlandopera.org.

CONCLUSION

Portland Opera | Strategic Plan

FY 2020–2024

**PORTLAND
OPERA**