



Volunteer Group/Company
Relationships:
Five Different Examples

The relationship between opera companies and their volunteer support groups takes many forms. There are many reasons for such a diverse history: how and when the group was formed, the changing needs of the companies, and the differing volunteer and staff cultures.

While opera companies are focused on producing the finest quality artistic productions within the means of their budgets, the mission of volunteer groups may be focused on fundraising for the company, bringing appreciation and understanding of opera to the community through educational programs, or providing direct service to the company and artists. Support groups are concerned not only with insuring the health of their opera companies with financial contributions, but also by building future audiences and nurturing committed patrons.

Individuals become opera volunteers for many different reasons, among them a passion for the art form and an eagerness to share that with others, and the desire for the social contact and prestige that working for opera affords.

Given the different aspects of support for opera, relationships between companies and volunteers need to be built on a recognition of common goals in an atmosphere of respect and effective communication, and upon the willingness and ability of volunteers and volunteer support groups to recognize the need to adjust relationships and goals as the needs of the opera company develop and change. Here we consider how five support groups and their companies have crafted their relationships.

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San Francisco Opera Guild

The San Francisco Opera Guild was formed in 1939 to provide opera education, to develop and encourage audiences, to provide fundraising and volunteer assistance, and to generate broad-based support for San Francisco Opera Association. The major educational program, "Student Matinees," was developed and has been the heart of the educational programs ever since.

Type of organization:

The guild, an independent 501(c)(3) tax exempt organization, developed through the years as a major fundraising organization, funding its education programs and making a contribution to the Opera Association. In fiscal year 2004 the guild contributed \$550,000 to the opera, spent an additional \$225,000 on its education programs, and provided 3,000 hours of volunteer help to the opera.

Guild Organization:

There are five Chapter Guilds in San Francisco and the Bay Area. The guild has its own board of directors (up to 100) and associate directors (those directors who have served as active board members for 5 years and still remain involved on a lesser level).

Officers:

A president, vice-president administration, vice-president associate directors, vice-president chapters, vice-president community outreach, vice-president development, vice-president education, vice-president fundraising, vice-president marketing, treasurer, secretary, and member-at-large comprise the executive committee. In addition, the past president and nominating committee and endowment chairmen are ex-officio members.

Duties:

Each of the vice-presidents is the head of a council which includes members of the board and other members of the community who work on projects of the Guild. For instance, there is a fundraising council, headed by the vice-president fundraising. Event chairmen are appointed by the nominating committee and they work with the VP and their committee with budget approval and oversight by the finance committee (headed by the treasurer) to produce their event. All officers are nominated by the nominating committee, approved by the executive committee and the president of the association, and voted on by the board.

Meetings:

The executive committee and the board of directors meet on a monthly basis at the same time and place. Committees meet as needed. The finance committee meets regularly once a month. Chapters meet in their local areas and operate quite independently, with financial records submitted to the SF Guild for inclusion with its annual financial records.

Guild/Company Relationship:

In 1989, the president of the Guild was an ex-officio member of the association board, but that was the extent of the communication and collaboration between the guild and the association. The Guild “surprised” the association with its annual gift. Communication was highly dependent the person in the office of Guild president and the leader of the SFO Association board. At that time, it became clear that the guild and the opera association needed to reevaluate their relationship to ensure cooperation in carrying out the common aims of the two organizations and to reduce the possibility of conflict and overlap of functions that had sometimes occurred in the past. When meetings between the president of the association and the president of the guild stalled over the issue of the

guild remaining a separate organization, the president of the guild and two long-term guild members worked with the opera company's development director to formulate the plan, which was then amended by the association president and two directors before it was approved by both boards.

The Proposal:

Four essential principles guided "The Proposal to Improve the Working Relationship between the SFOG and the SF Opera Association" in order to capitalize on the unique capabilities of each group and to maximize revenues and other benefits:

- The relationship needed to capitalize on the unique capabilities of each group to maximize revenues and other benefits.
- Specialization is preferable to duplication of effort.
- There should be no transfer of funds between the Guild and the association except for the guild's year-end contribution and payment for Student Matinees and the association's proposed payment to the Guild for membership services.
- The Association has the ultimate responsibility for the development and success of the San Francisco Opera.

With these principles in mind, a proposal was worked out that was approved by the board of the guild and the board of the opera association. The basic points:

Recognition: The Guild would be recognized for contributions that take many forms - cash and in kind as well as volunteer hours.

Education: The Guild would continue to provide *Student Matinees*, in-school programs, *Operatunities*, *Insights*, *Preview Tapes*, *Opera Partners*, scholarships, and other new programs that help fulfill the guild's goal of opera education for students and adults, and wider appreciation of opera, thus building opera audiences of the future and keeping the guild in the forefront of arts education.

Volunteer Services: The Guild, working with the Association, will

continue to coordinate volunteer services for the opera family, recognizing there may be a need in the future for a paid volunteer coordinator. (There is now on staff a part time volunteer coordinator paid for by the guild.)

Membership: The Guild agreed to stop its membership activities. In exchange the opera would make solicitations and the lowest level of donor would be designated “Guild Member” and would receive the benefits of membership in the Guild: the guild “Season Book” and free entrance to the Guild’s *Insight* lectures. Since the Guild was interested in the educational value of these benefits, the Guild was delighted that the benefits would go to 14,000 members who gave a contribution to the opera instead of only 1,000 as before. The opera company agreed to pay for these benefits out of the membership monies generated by their solicitations. The Guild benefits were extended to all donors.

Newsletter: The Guild would cancel their newsletter and the opera would include a segment on guild activities in the association newsletter.

Events: Since the Guild excelled at producing fundraising events, they were to continue to produce events. All monies generated by these events go into the Guild financial accounts to fund the Guild’s entire expense budget and operating reserve. The surplus for the year represented the annual gift to SFO.

Budgets: The guild would meet with the association to determine the budget for the year. The contribution goal of the guild would appear in the association’s budget.

Development: A committee composed of both guild and association directors would meet on an annual basis to determine who would solicit sponsors and underwriters. Following that meeting, all additional prospects of the guild would be approved by the development director, ending the overlap of solicitation.

Public Relations: The association's director of public relations at the opera company would review and coordinate all press and media releases.

Bylaw changes: The Opera Association would become the only "Affiliated Member" of the Guild with the right to approve the slate of officers, the annual plan of the guild and all bylaws changes.

Communication: The Guild president and past president sit on the San Francisco Opera Board of Directors.

The general director and president of the board are invited to speak to the Guild board on various occasions during the year. Many opera board directors are generous supporters of guild events and programs.

This proposal was approved by both the board of the Guild and the board of the association. The Guild and association have been working under this plan over the years. The Guild staff consists of an administrative director, an assistant to the administrator and volunteer coordinator, an events coordinator, a financial manager, and half salary of the director of education and the part time position of *Opera a la Carte* coordinator.

In the past ten years, there have been informal changes to this plan. For instance, the Guild no longer buys *Student Matinee* productions from the company and the students instead go to a final dress rehearsal. The Guild has enhanced and added new education programs, shelving others. The association and the guild have collaborated on a number of successful events and communication and cooperation has increased. The Guild established an endowment for opera education, currently worth \$1.3 million dollars, the income from which is spent on guild opera education programs. Last year this added \$35,000 to the education budget.

The benefit of this written and adopted proposal was the clarifying of the lines of responsibility and the establishment of guidelines for working together under the umbrella of the San Francisco Opera Association as

separate tax-exempt organizations.

Austin Lyric Opera Guild

The Austin Lyric Opera Guild charter membership meeting was held on June 11, 1986. Four hundred people attended and became members at that time. The mission of the ALO Guild is to assist and support the Austin Lyric Opera through participation in the volunteer activities of fund raising, special events, education, audience development and support services. In 2000, Austin Lyric Opera became the only opera company in the country to operate a music school: its music education to the community had already served thousands of students, from pre-school through adult, by providing individual and group instruction in the vocal and instrumental arts. In 2004, the guild revised its bylaws to better reflect the growing role of our school in some of the opera education activities once performed by guild volunteers. The Guild's new purpose statement emphasizes encouraging community involvement in the development and furtherance of the Austin Lyric Opera through fundraising.

Type of Organization:

The Guild is an auxiliary organization of the Board of Trustees of Austin Lyric Opera.

Guild Organization:

The ALO Guild board of directors is the governing body of the guild. The Guild board of directors consists of the officers and such committee chairmen as the president appoints to serve. Its composition remained substantially unchanged until 2002-03, when two new positions were created to reflect new initiatives the guild had set for itself in its strategic planning efforts throughout the summer of 2002. The positions added to the board were Vice-President of the Auction and Vice-President for New Fundraising Event.

Historically, the Guild's annual *Opera Ball and Auction* has been its chief

fundraising event (in 2004 netting over \$185,000). The creation of the VP Auction (elevated from its previous subcommittee position) was intended to raise the profile of the auction component of the ball. The VP New Fundraising Event had been leading a committee exploring various new fundraising opportunities since summer 2002; giving this effort VP status on the board of directors underscored its importance to the future of the Guild. In the spring of 2004, this position was replaced by VP of the Garden Festival, which now oversees the new series of events that had been developed and pilot tested by the New Fundraising Event Committee.

Officers:

The current officers of the guild are president, president-elect, vice-president education, vice-president special events, vice-president Audience Development, vice-president communication, vice-president of The Ball, vice-president of The Auction, vice-president membership, vice-president of merchandising, vice-president of support services, vice-president of volunteer operations, treasurer, secretary, parliamentarian, advisors (not to exceed eight) and such other officers as determined by the executive committee. The immediate past president of the guild serves as an additional advisor for one year or until a new president is elected.

Membership:

There are currently six classes of membership: Active Individual, Active Couple, Associate Individual, Associate Couple, Honorary and Student. Membership in the Guild is open to all persons who are interested in furthering the purposes of Austin Lyric Opera and have paid their annual dues. There are currently no service or contribution requirements for being a member of the Guild.

Guild Activities:

1. Fundraising - *Annual Opera Ball and Auction*, Special Events (eg, *Season Opening Night*, *Opening Night Dinners*), and the new three-

day *Garden Festival*. The Guild's merchandising committee also raises funds through the sale of opera related goods at performances and other ALO events, and on the company website

2. Audience Development
3. Support Services - Visiting artist hospitality and miscellaneous staff support.
4. Opera education for the public is now done through our school, which has its own board of directors. The VP of Education is the guild's liaison to the school board and also develops and conducts education activities for guild members. .

The Guild itself does not employ any staff. An overhead contribution line in the annual budget funds a portion of the salary of the assigned staff liaison.

This model has worked well and most guild members are satisfied with this structure. The Guild is one of ALO's top sources of contributed revenue annually and also gives thousands of volunteer support hours each year to benefit the company. It is perceived as a useful part of the organization by the current leadership of the Board of Trustees and the new artistic and managing directors.

Lyric Opera of Chicago: Chapters and Chapters' Executive Board

Type of Organization:

The 21 Lyric Opera of Chicago Chapters are community-based volunteer groups that operate within Lyric Opera of Chicago's Development Department and are guided by the 40-member Chapters' Executive Board. The Chapters' Executive Board (CEB) has representatives from each of the chapters. They meet at least eight times per year. For instance, the CEB writes and approves the by-laws under which each chapter must operate. CEB members are voted onto the board yearly and officers have a two- year term limit on their position. There is no term limit for those serving on the CEB. Representatives from Lyric's Chapter office (paid employees) attend every CEB meeting and approve basically everything done by the CEB and chapters.

Chapters:

The number of Chapters' has fluctuated over the years but each has its own board of directors and each plans and drives its own events. The largest Chapter has 400 members and the smallest in size is about 40 members.

Membership:

With a total of 2,300 members, the chapters are located throughout the Chicago-land area and most are within about a 100 mile radius of the company's Loop theater and offices. The oldest chapter was chartered in 1959. A minimum donation of \$50 to LOC is required of members and a membership fee of \$20 is retained by the individual chapter.

Purpose:

The original purpose of the chapters was to sell Lyric subscriptions or individual opera tickets, but now the mission is to educate the membership, promote the advancement of opera within the community and help raise funds for Lyric Opera of Chicago. The goal this year is \$1.4 million most of which is received from individual member donations.

Fundraising:

The primary all-chapter fund raising event is a 16-hour radio marathon called “Operathon.” Over 200 merchandise and premium orders are processed on this one day in the fall and over 100 chapter volunteers work to staff this event.

Membership profile:

Each chapter has its own unique character and members are free to join that one (or more) whose membership and programs most match their tastes. The 21 chapters’ plan about 145 events per year within their communities: about 85 of the programs are lectures and about 60 are musical programs. Each chapter has its own budget and bank account and its own board of directors. However, each chapter is required to report its financial activity to Lyric Opera every month and revenue in excess of that needed to maintain the chapter are to be forwarded to the company.

The chapters are supported by three, full-time salaried people from Lyric Opera of Chicago’s Development Department. The Chapters’ Executive Board is one of five volunteer boards serving Lyric Opera of Chicago.

Forming a new Chapter:

If there is potential for a new chapter to be added, a search committee is formed. A minimum of 30 participants are needed to form a new

chapter. Starting one requires the approval of the Chapters' Executive Board and Lyric Opera of Chicago, but currently there is a freeze on adding new chapters unless the need is very specific. A concerted effort is being made now to increase the membership we have within the 21 chapters. The chapters have served the company well for 45 years and provide a camaraderie within the community that continues to support opera.

OPERA OMAHA GUILD

The Opera Omaha Guild was founded in 1967 as the Opera Angels. Composed primarily of devotees of opera, it specialized in teas, study groups, social events and minor fundraisers. By 1984 the Angels' stable, if not shrinking, membership was aging while Opera Omaha's needs were growing. The board of directors needed a line item dollar promise greater than \$10,000 a year to support an ambitious program.

Type of Organization:

The president of the Opera Omaha Board of Directors formed a committee of board members, Opera Angels and others to facilitate a change. Out of those meetings, the Opera Omaha Guild was formed, as a part of the company, working under the development department. Its purpose was (and is) to promote opera, to fund and assist in opera education, to pledge and raise major funds in support of Opera Omaha, and to cooperate in related activities.

An Opera Omaha Guild president learned at an Opera Guilds International Conference that a guild should have a voting position on the company's board of directors, so that connection was implemented, with the guild president now sitting on both the board and the executive committee of the organization.

The Guild creates and runs its own events, keeps its own books and has its own bylaws, but is incorporated under the company's 501 (c) (3) designation.

Guild Board and Officers:

The Guild board is large (about 30 members) and project based. The executive committee consists of a president, president-elect, recording and corresponding secretaries, treasurer, and vice-presidents overseeing the

realms of social, membership, fund-raising and education activities. Appointed chairs of the various activities comprise the voting board.

Membership:

The general membership does not have voting privileges but receives a directory, the newsletter, invitations to guild and opera company events, and has the opportunity to serve on many working committees and eventually on the board. Membership is open to all at many levels and offers an “add a partner” (at the same address) option for an additional \$5.00 at any level.

Company/Staff Relationship:

Opera Omaha Guild has no professional staff, but has a staff liaison who, in recent years, has attended most guild and major guild project meetings. A new addition to guild bylaws guidelines is Opera Omaha Board’s approval of the guild budget in addition to accepting its line item pledge which is currently in excess of \$175,000. The Guild is listed as one of the largest donors to the company (if that is possible, since it’s a part of it!).

Cooperative efforts between the Guild and company are the *Bravissimo* newsletter, started by the Guild but now produced by the company and partially underwritten by the Guild, opening night parties, “*Opera on Trays*” preview dinners held in the Opera Omaha lobby with previews by staff, and welcome parties for cast members.

Fundraising:

Major fund raising efforts by the Guild include *Teen Cotillion*, *The Snowflake Ball* and *Opera Omaha Wine Seller*, which support outreach and education projects of Opera Omaha (and sometimes some aspect of a production.).

Opera Omaha Guild members are respected by the Board of Directors

of Opera Omaha and the by the paid professional staff as equal (but unpaid) professionals working as partners for the promotion of opera in the greater Omaha area. The Guild is respected for their fundraising, volunteer help, and as a part of the opera's publicity team. There is a real spirit of cooperation and friendship between paid and unpaid workers, guild members and trustees, all working for the good of the opera.

New York City Opera: New York City Opera Volunteer Corps

Organization:

Until about a decade ago, the New York City Opera's volunteers were members of an autonomous guild, operating under separate bylaws and 501(c)(3) status. There came a time when the company decided that volunteer activities could be implemented and maintained more efficiently and more consistently in line with the mission and priorities of the company as a fully integrated part of the company rather than a stand-alone organization. The guild bylaws were then suspended and the New York City Opera Volunteer Corps was formed.

Management of Volunteers:

The Volunteer Corps is managed by a company staff director whose responsibilities are volunteer services and retail sales. While the Volunteer Corps serves the needs of all departments of the company, its partnership with marketing is particularly strong in that this is the department that oversees all sales and image related aspects of NYCO.

Volunteer Project Management:

The structure is crafted for simplicity and efficiency. Volunteer project managers, reporting to the Director of Volunteer Services, manage each project that the company designates as a priority. The role of the project managers and volunteers is essentially an augmentation of staff resources. As such, they are held accountable to the same expectations in standards of performance as staff. There are currently more than 250 active volunteers. In addition to the volunteers who staff projects, there is

selective placement of volunteers within departments of the company on a regularly scheduled basis. For example, a retired senior executive assistant from a major corporation comes regularly twice a week and maintains all the databases for the development department; a retired school teacher with excellent verbal skills is regularly scheduled in the Group Sales Department to make sales calls; a retired producer of documentary films backs up the Director of Volunteer Services by scheduling interviews for all potential volunteers and assessing the results of the interviews. She also fills in for the Executive Assistant of the General Director during vacation and sick days.

Volunteer Officers:

The only officers of the Corps are a president and a vice-president with two year terms of office. The officers are selected and appointed by the company.

1. The president, collaboratively with the Director of Volunteer Services, schedules and chairs a quarterly project managers council meeting; works with the Director of Volunteer Services and Director of Marketing in developing new volunteer initiatives; is an ombudsman/liaison between volunteers and company management; and represents the Volunteer Corps in an ex-officio capacity on the New York City Opera Board of Directors.
2. The vice-president also serves as the president-elect. All the project managers, as well as the president and vice-president, continue to maintain active, hands-on volunteer assignments.

Volunteer Skills Assessment and Training Process:

In order to ensure the highest level of performance there is a continual emphasis on assessing the skills of volunteer applicants and on providing comprehensive training. Skills assessment and training is a multi-step process beginning with the first identification of a potential volunteer. Following are the steps of the process.

Skills Assessment:

1. When a person first indicates an interest in becoming a volunteer, he or she is sent a form on which to indicate their skills and interests. The form is returned to the Director of Volunteer Services.
2. That person is then assigned to one of the Volunteer Corps' project managers for a personal interview. Through the personal interview, the manager is able to add texture to the information contained in the form as well as explain to the applicant a bit about each project and the expectations from the volunteer for each project. The project manager is able to assess the degree of interest and motivation and can help to assign the potential volunteer to the most appropriate project given the volunteer's skills set. The potential volunteer can ask questions so that later there are no surprises regarding what is expected.
3. All the information from the skills assessment form and subsequent interview is kept in a database that can be retrieved in a variety of ways. When the database software was first installed two years ago, the forms were sent to all existing volunteers so that the information is complete for all 250+ Volunteer Corps members. A photograph of the volunteer for easy identification accompanies each database entry. The photograph is also used on the identification badges volunteers must wear when working in-theater.

Volunteer Work Assignments:

At the beginning of each season, volunteers are sent project-specific sign-up grids to fill out for the dates that they will be available to work throughout the season.

Training Scheduling and Content:

Volunteers are also given a choice of two dates for a comprehensive training session. One training session is held on a weekday evening at 6PM and the second one on a weekend. Each session is structured so that the first half of the session covers all aspects of what a volunteer must know, including a briefing on the upcoming season productions and the performers, and then the second half of the session is in break-out sessions by project for which they have signed up. Every volunteer that is to work during the season, regardless of how long they have been volunteers, is required to go through the training session.

At the training session, the volunteers are provided with the most recently updated handbooks and the Season Guide. They are expected to study the Season Guide to be thoroughly familiar with all the productions and casts before the season begins. They are also expected to be knowledgeable about the history of the company, the venue and Lincoln Center.

Training Duty Officers and Captains:

There is a separate training session for the duty officers and the captains. The duty officer is the person who is in charge of all in-house volunteer activities on a given performance date and the captain is the person in charge of a specific project such as the information tables or gift shop or lecture. Ordinarily, the director of volunteer services or his assistant is also in-house at every performance.

How Volunteers are assigned:

1. Usually, new volunteers begin at the gift bar where they can begin to get a sense of what the company is all about without the

direct responsibility of providing information. However, sometimes volunteers ask to begin at the information tables if they have no interest in selling merchandise. In that case, these volunteers will work for the first few times together with an experienced volunteer to make sure that they learn the correct procedures and are able to answer questions with ease.

2. Volunteers interested in being a backstage tour guides must first work at the information tables for at least one season and preferably two. The project manager for the information tables service must then evaluate them and, upon vetting by the Director of Volunteer Services and the President of the Corps, they are invited to become part of the backstage tour team. Once they are accepted into the team, candidates must go through a multi-step training process:
 - a) an in-depth orientation session providing an immersion course into NYCO and Lincoln Center history, and venue architecture and art in addition to the overall expectations from and instructions on being a tour guide
 - b) an actual tour led by an experienced tour guide
 - c) a workshop in speaking skills led by a professional in the field; and finally
 - d) a session during which each candidate must prepare and give a brief presentation to demonstrate his or her skills. Those who successfully accomplish the training program are then invited to become tour guides. As their first assignment they must each accompany several tours as an observer to understand different presentation styles, and then, when assigned a tour of their own for the first time, be accompanied by a senior guide who evaluates the performance.

If it is found that a volunteer cannot fulfill his or her obligations for any given project or is providing misinformation of any sort, the matter is referred to the Director of Volunteer Services for action.

The New York City Opera believes that our volunteers are a

reflection of the image of their company. As such, each can be a powerful marketing tool. In order to ensure that this image is properly presented, the company places a major emphasis on training and monitoring appropriate behavior and appearance.