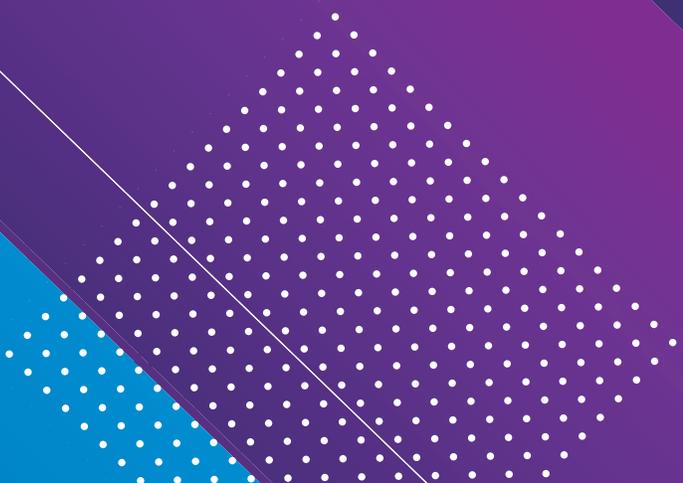
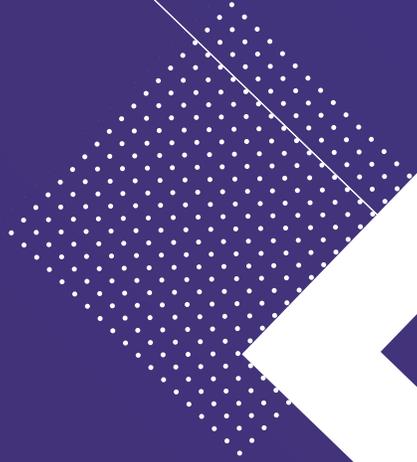


OPERA  
AMERICA

# Annual Field Report 2022

[operaamerica.org/AFR](https://operaamerica.org/AFR)



# From the President and CEO



2022 marked another unprecedented year in the progress of American opera. As this report documents, the impact of the pandemic continued to upend company seasons across the country. Earned income plummeted along with the number of main season productions and performances. Contributed revenue remained relatively steady, however, and the considerable revenue from federal COVID-19 relief programs helped companies end fiscal year 2021 with improved working capital. We remain grateful that lawmakers recognized the arts sector as important to national well-being during a time of crisis.

Under the surface of this summary are important industry dynamics. Attendance at performances remains variable and unpredictable. Reports indicate that 20% to 30% of subscribers have not returned to theaters. At the same time, record numbers of first-time attenders are enjoying new works that resonate with the world around us. The challenge, now, is to find ways to induce them to return with the hope that, over time, they may join the ranks of subscribers and donors.

The nationwide Great Resignation has hit opera too, and many companies are struggling to rebuild their staffs with talented professionals committed to opera. Competition for this talent is intense, requiring companies to recalibrate salary levels, benefits, and workflow. Inflationary pressures extend as well to other areas of the opera enterprise, especially in relation to set and costume construction, transportation, and housing costs. The fragile economy of opera has become even more fragile.

Through this period of uncertainty, great art continues to shine through. An unprecedented number of new works are taking center stage, helping to define opera in contemporary American terms. Many of them are created by composers and librettists who are new to opera and bring new musical and narrative styles into our theaters. Digital creativity has opened a new dimension of the art form that reaches audiences who have never previously enjoyed opera.

This annual report of the finances of the opera industry once again provides a snapshot of a year shaped by the global pandemic. Although the findings are necessarily divergent from the years before COVID, it is important to have a basis for comparing individual company performance to the field as a whole, even through this transitional time. The OPERA America staff will be pleased to answer any questions that arise from this report and to prepare customized analyses upon request. Please do not hesitate to contact us.

A handwritten signature in black ink that reads "Marc A. Scorca".

**Marc A. Scorca**  
President/CEO  
OPERA America

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## About OPERA America

OPERA America is the national membership organization for artists, administrators, trustees, and audiences, dedicated to supporting the creation, presentation, and enjoyment of opera. It is committed to developing new work and new audiences, civic practice, artist and leadership development, research, national advocacy, and promoting inclusivity that moves opera forward across America.

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Previous publications of the *Annual Field Report* can be accessed at [operaamerica.org/AFR](https://operaamerica.org/AFR).

**O**PERA America's *Annual Field Report* is designed to provide leaders and advocates across the field with a comprehensive overview of the financial positions of its company members. Information for this report, based on the 2021 fiscal year, is derived from the annual Professional Opera Survey (POS) administered by SMU Data Arts. The POS was completed this year by 156 of OPERA America's U.S. Professional Company Members (the "Survey Universe"). Only those companies in the Survey Universe that have reported consistently for the most recent five-year period are included in the Constant Sample Group (CSG). This year, 99 companies qualified for the CSG.

The report is headed by "The Field at a Glance" — an exploration into financial and attendance totals based on the Survey Universe and extrapolated for the full company membership. The 156 companies in the Survey Universe represented 75% of OPERA America's current Professional Company Membership, and their collective operating budgets totaled over \$519 million. Extrapolating by budget group for those PCMs that did not complete the survey, the North American opera industry injected over \$570 million directly into the economy in fiscal year 2021. This figure does not include the extensive activity of OPERA America's Associate Members, Educational Producing Associate Members, and the few North American opera companies outside the membership — nor the ancillary economic impact of activity related to attendance. Steady readers of this report will note a second consecutive year of financial contraction across the industry due, once again, to the impact of the COVID pandemic on overall production/performance activity in the United States and Canada.

For the purposes of consistent reporting with the other years in the five-year period covered by this report, production and performance counts continue to track only main season staged performances of operas and musicals. Performances that were presented digitally were counted only if they were shared live and

not pre-recorded. While this reduces the imprint of the 2020–2021 season dramatically, it is done to preserve consistent points of comparison with prior years. In the Constant Sample Group reports, companies that did not offer live staged performances during the 2020–2021 season still are included in reported averages.

However, this year's report has been expanded to include a section that summarizes the alternate programming offered during the full pandemic season (see page 4). This activity was varied and greatly expanded the reach of opera companies, but documenting the related audience reach is beyond the scope of this survey and report. Finally, the results from a separate survey issued last year to Professional Company Members (127 respondents) that documented the total federal aid received by the field to combat the effects of COVID-19 are included once again for reference (see page 4).

In this report, as usual, OPERA America's Professional Company Members are aggregated into five budget groups. Budget group delineations are noted in the report. Normally, OPERA America moves opera companies between budget groups based on their most recently reported financials. Due to the major fluctuation of finances in FY2020 and FY2021 as a direct result of the pandemic, OPERA America has maintained nearly all budget groupings from the FY2019 report. First-time survey participants were assigned to their appropriate budget groupings based on their FY2021 financials. In the reports by budget group, consolidated charts and key points are provided for ease of use, with full data on the pages following. Due to a lack of participation, a Constant Sample Group report for Canadian companies is omitted from this report.

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**Those interested in learning more should contact OPERA America's senior research manager, Alex Ganes, at [AGanes@operaamerica.org](mailto:AGanes@operaamerica.org) or 646.699.5243.**

## Table of Contents

The Field at a Glance in 2021 .....	2
COVID Impact .....	4
<b>FY2021 Financial Analysis</b>	
Guide to Terminology .....	5
Overview of Findings .....	6
Budget 1 .....	8
Budget 2 .....	11
Budget 3 .....	14
Budget 4 .....	17
Budget 5 .....	20

### **OPERA America**

2022 By the Numbers .....	23
2022 Financial Report .....	25
Annual Support .....	27
Organizational Members .....	32

# The Field at a Glance in 2021

**A**cross the United States and Canada, opera is a vital part of communities of all sizes. Opera companies large and small are deeply rooted in their cities, strengthening their communities by forging partnerships that bridge economic, social, and cultural divides and create positive change.

Entrepreneurial artists and innovative leaders are expanding the definition of opera, the opera audience, and the audience experience. Singers, composers, librettists, directors, designers, and other artists are infusing the art form with a diversity of stories, perspectives, and artistic styles never seen before.

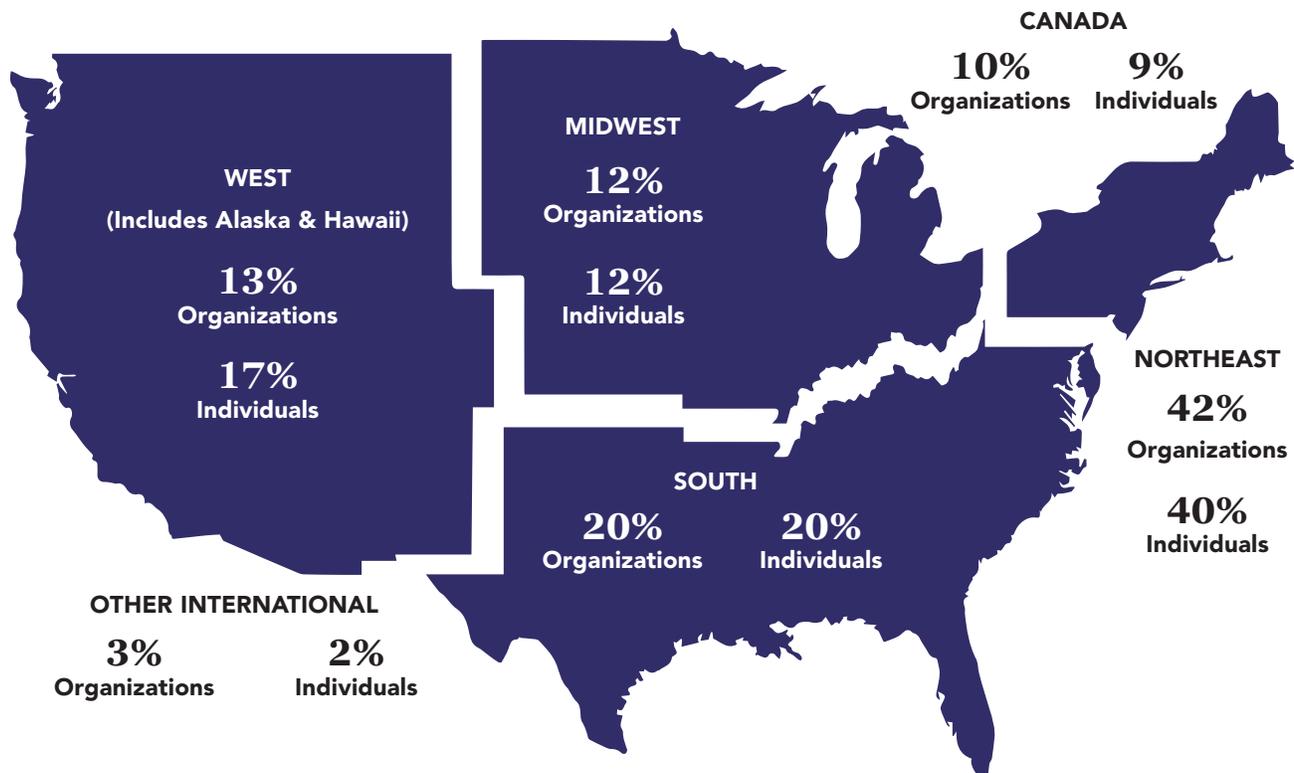
## OPERA America Membership

**209**  
Professional Company  
Members (PCMs)  
in North America

**62%**  
of PCMS have an  
annual budget  
under \$1 million

**554**  
Associate, Business,  
Career Service, and  
Educational Members

**3,472**  
Individual  
Members

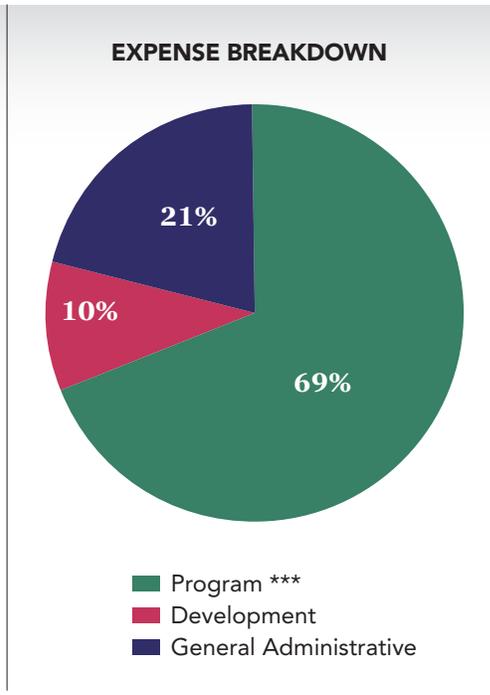
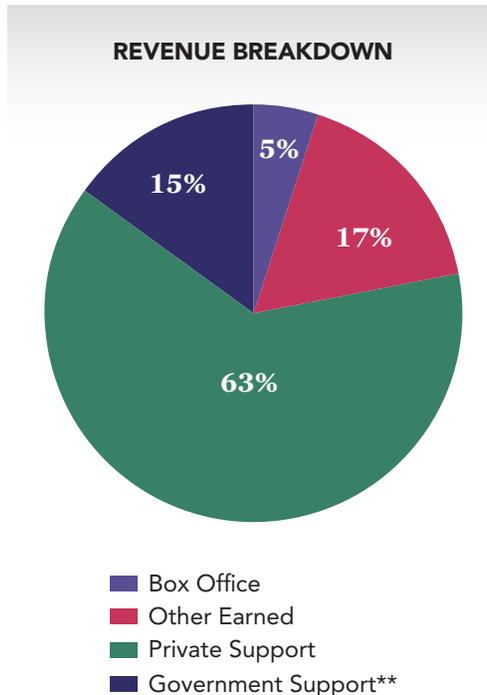


**130**  
U.S. cities have  
professional opera  
companies (U.S.)

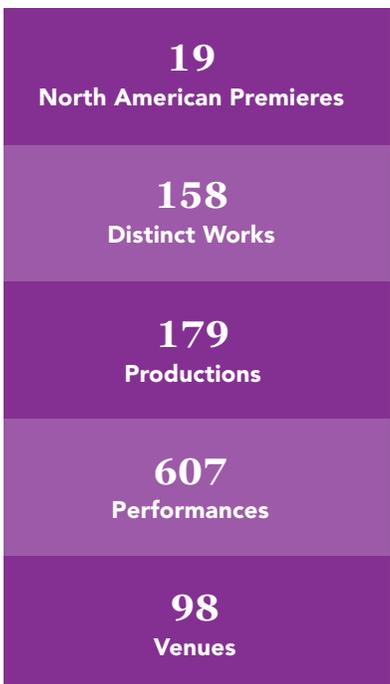
**11**  
Canadian cities have  
professional  
opera companies

**92%** of the top  
20 largest U.S. cities  
have professional  
opera companies

# Economic Impact



# Performance Activity: 2020–2021 Season



## REPERTOIRE



## TOP 5 MOST-PRODUCED WORKS

1. *The Barber of Seville*
2. *La bohème*
3. *Madama Butterfly*
4. *Scalia/Ginsburg*
5. *La serva padrona*
5. *Pagliacci*

## TOP 5 MOST-PRODUCED NORTH AMERICAN WORKS

1. *Scalia/Ginsburg*
2. *As One*
3. *desert in*
4. *Amahl and the Night Visitors*
5. *The Medium*

Data is from the FY2021 Professional Opera Survey, extrapolating for OPERA America's full Professional Company Membership and the most up-to-date information from OPERA America's Performance Database.

\* Administrators include full-time, part-time, and contract positions.

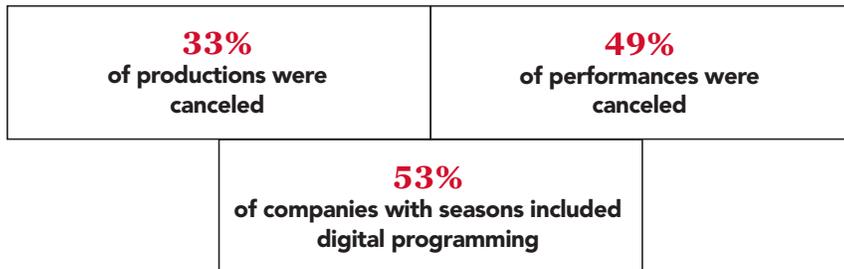
\*\* Some companies recorded COVID-19 government relief funds as support in FY2020 and FY2021 upon notification of loan forgiveness. Remaining government relief funds will be reflected in the FY2022 Annual Field Report.

\*\*\* For the purposes of this report, marketing expenses are included in program expenses.

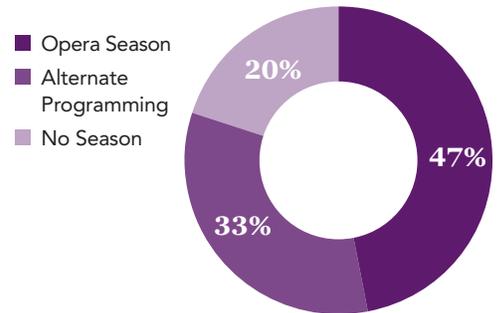
# COVID-19 Impact

## 2020–2021 Season Programming

The 2020–2021 season was the first full season, to take place during COVID-19. As such, it was different from the prior season, which was abruptly halted by the pandemic. Despite the additional planning afforded to the 2020–2021 season, which started in September of 2020, it still fell victim to sudden cancellations and adjustments corresponding to the ebbs and flows of COVID-19. Smaller Professional Company Members took the biggest hit to programming, with 35% of Budget 5 companies presenting no season.



### MAIN SEASON TYPE\*



### MAIN SEASON PROGRAMMING\*\*



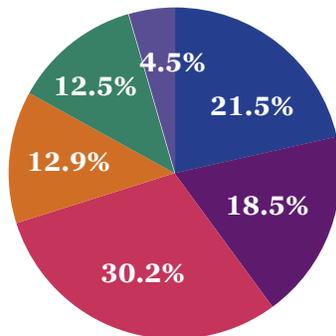
\* Companies with "opera seasons" put on at least one live staged full opera or musical — in-person or digital — in the 2020–2021 season. Companies with "alternate programming seasons" had a season in 2020–2021 season, but had no live staged full operas or musicals.

\*\* All listed programming may have been presented live or digitally. Film releases includes any operas or other programming that was prerecorded and released as an official part of a company's 2020–2021 season.

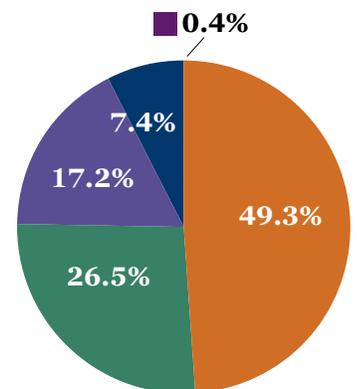
## Federal Aid Received by Professional Company Members\*



PPP1	\$47,633,158
PPP2	\$40,867,590
SVOG1	\$66,762,155
SVOG2	\$28,620,574
ERTC	\$27,574,803
Other	\$9,953,005



Budget 1	\$109,249,521
Budget 2	\$56,737,943
Budget 3	\$38,008,073
Budget 4	\$16,444,733
Budget 5	\$971,015



\* Totals were provided by 127 Professional Company Members as of September 30, 2021. An additional \$2–10 million in federal aid is predicted to be unaccounted for from the remaining Professional Company Members for that time period.

# FY2021 Financial Analysis: Guide to Terminology

The financial analysis of OPERA America's Professional Company Members that follows is based on data from fiscal year 2021.

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## Average Yield Per Ticket Sold

Total box office income divided by the total number of tickets sold. For FY2020 and FY2021, yield per ticket sold excludes box office revenue from alternate programming, which accounted for a disproportionate amount of box office revenue compared to pre-pandemic seasons.

## Core Artistic Expenses

Core artistic expenses encompass both personnel and non-personnel artistic expenses directly associated with staging productions. This may include costs associated with singers (soloists and choristers), instrumentalists, technicians, stage sets and props, artistic administrators, etc.

## Endowments and Reserve Funds

An endowment is a restricted income source established to generate revenue for an organization. This includes board-designated, term, and permanently restricted endowments. A reserve fund is a more liquid asset, with an unrestricted principal body. Note that in this report, these funds have all been merged.

## Fixed Assets

Fixed assets include all land, buildings, equipment, any capitalized production elements (sets, props, costumes), and other fixed assets owned by the organization. Fixed assets are generally unrestricted. Net fixed assets are net of accumulated depreciation.

## Investments

Investments include current and long-term investments (stocks, bonds, etc.) as reported on an organization's balance sheet. Income from investments is available for operations or to support specific purposes. Note that this does not include separately incorporated endowments or reserve funds that are absent for the company's balance sheet.

## Productivity Ratios

Productivity ratios measure how many dollars are generated for each dollar spent on revenue-generating activities. Expenses include personnel and non-personnel costs. Marketing productivity is the total box office revenue divided by marketing expenses. Development productivity is the total contributed revenue (including unrestricted and restricted) divided by development expenses.

## Program Coverage

Program coverage is the percentage of core artistic expenses covered by box office revenue.

## Program Expenses

Program expenses are all expenses related to an organization's programs and services. While this encompasses core artistic expenses, it also includes marketing, box office, and other expenses associated with producing and promoting staged performances.

## Total Net Assets

Total net assets include unrestricted net assets (no donor-imposed restrictions) that are available for current use, generally including fixed assets; and restricted net assets, representing gifts for future periods or for specific projects and most commonly, endowment funds. Changes in the value of restricted net assets may reflect increases/decreases in the market value of existing investments or new donations.

## Working Capital

Working capital is a measure of a company's liquidity and short-term financial health. It is the difference between a company's current assets (cash, accounts receivable, etc.) and current liabilities (accounts payable, accrued expenses, etc.).

# FY2021 Overview of Findings

This *Annual Field Report* provides analysis on the second in a series of at least three fiscal years that will reflect the profound impact of COVID-19 on the opera field. Unlike FY2020, which was upended in March of 2020 by the onset of COVID and related production/performance cancellations, this report for FY2021 documents the impact of the pandemic across an entire tumultuous season.

The *Annual Field Report* clusters Professional Company Members by budget groupings and provides averages across many data points. However, this year's averages mask a greater range of variation among reporting companies than any previous report. Summer festivals, to cite just one example, were canceled entirely in FY2020, but returned to nearly complete seasons in FY2021 — while many companies with traditional winter seasons continued to cancel productions and performances during the COVID surges in the winter months of 2020–2021. Such seasonal and regional variations must be taken into account when using the data contained in this report for individual company benchmarking.

The cancellation of staged productions should not obscure the tremendous amount of alternative programming that took place during FY2021 — from outdoor performances to productions entirely conceived and created for digital platforms. Most companies that reported only a few in-theater performances were still very busy improvising new ways to reach audiences, and overall budget expenditures reflect this range of activity.

In past *Annual Field Reports*, data analysis focused most closely on variations between the current and immediate previous year, i.e., FY2021 to FY2020. For a more complete understanding of the impact of the COVID pandemic on Professional Company Members, this year's report makes frequent references to FY2019 — the last complete season prior to the pandemic.

---

## Productions, Performances, and Ticket Sales

- The production activity of Professional Company Members was reduced drastically in FY2021 from FY2020 because of the pandemic. Whereas COVID resulted in the curtailment of seasons in FY2020 from mid-March through the end of that year, in FY2021, entire seasons were reduced or canceled as COVID waxed and waned across North America.
- In the 2020–2021 season, Budget 1 companies on average produced 1.3 staged operas, down from the average of 6.8 in the 2018–2019 season (an 82% reduction). Budget 2, 3, and 4 companies experienced reductions in productivity of between 53% and 66% percent from the 2018–2019 season to the 2020–2021 season. The majority of Budget 5 companies did not produce any staged opera in the 2020–2021 season, although many reached audiences on digital platforms.
- The reduction in the number of performances across the field was most notable among Budget 1 companies — which, with the highest level of productivity, saw the largest statistical decreases in activity — and Budget 5 companies, many of which did not offer staged performances at all in the course of the year.
- With many fewer public performances, paid attendance dropped precipitously — as much as 94% for Budget 1 companies when compared to the most recent pre-pandemic season of FY2019. Again, Budget 1 and 5 companies recorded a steeper decline in attendance in the 2020–2021 season compared to other budget groups, consistent with their more extreme reduction in performance activity.

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## Financial Overview

- For Budget 1 to 4 companies, the financial contraction set in motion in FY2020 continued in FY2021 with one-year declines ranging from 16% (Budget 4 companies) to 32% (Budget 1 companies). Total expenses for Budget 5 companies remained consistent with FY2020, on average. It is important to note, however, that while some program expenses declined with reduced numbers of staged productions, new expenses were incurred in relation to digital projects, outdoor performances, and other special activities designed to remain in contact with constituents.
- With the exception of Budget 5 companies, on average, companies in the other Constant Sample Groups ended the year with operating surpluses ranging from 8.7% of total expenses (Budget 4 companies) to 31% of total expenses (Budget 3 companies). Budget 5 companies had, on average, a deficit of 1.2% of total expenses. This generally positive financial outcome results from reduced production expenses, steady donor support, and an inflow of revenue from federal relief programs.
- Thanks to operating surpluses and a strong stock market, working capital and endowments experienced healthy gains in FY2021.

## Operating Revenue

- Consistent with reduced seasons, box office income declined significantly in FY2021 compared to FY2020. When compared to FY2019, the most recent pre-pandemic season, average box office revenue declines ranged from 59% (for Budget 5 companies) to 90% (for Budget 1 companies).
  - Over the two years since FY2019, companies in the Constant Sample Group saw steady decreases in total private support across all budget groups ranging, on average, from 7% (Budget 5 companies) to 29% (Budget 2 companies). Individual support decreased the most for companies in Budget Groups 2 through 5, with reductions ranging from 29% (Budget 2 companies) to 41% (Budget 4 companies). For Budget 1 companies, on average, increased individual support since FY2019 was offset somewhat by reductions in board giving, which dropped 50% in the two years from FY2019 to FY2021.
  - While most companies received generous government support through various federal programs to offset the losses from COVID, reporting on this revenue is inconsistent. Some companies recorded pandemic-related federal aid upon notification of loan forgiveness as early as FY2020, while others reported this income in FY2021. Final payments from some programs will not be documented until FY2022. As a result of the support that has been received and recorded, income from government sources increased from 239% (Budget 5 companies) to 312% (Budget 2 companies) when compared to FY2019. A chart on page 4 provides an overview of how COVID-19 federal aid was distributed across the field.
- 

## Operating Expenses

- Reflecting the drop in performance activity, artistic expenses decreased precipitously in FY2021. When compared to FY2019, artistic expenses for companies in Budget Groups 1 through 5 decreased between 38% (Budget 3 companies) and 44% (Budget 1 companies) in FY2021. It should be noted, however, that artistic expenses did not decline proportionate to the decrease in the number of main season productions and performances as a result of expenditures related to digital activity and other public offerings during periods of in-theater cancellations.
  - The trajectory of development spending greatly varied in FY2021. While development personnel expenses remained relatively flat or increased, non-personnel expenses decreased for many companies due to the cancellation of galas and other fundraising activities. Taken together, for Budget 1, 2, and 3 companies, overall development expenses in FY2021 were reduced between 13% (Budget 3) and 23% (Budget 1) when compared to FY2020. Budget 4 companies, however, documented small gains in development expenses (4.3%) while Budget 5 experienced larger gains (20%) compared to FY2020.
  - Companies in Budget Groups 1 through 4 reported significant declines in marketing expenditures for FY2021 compared to FY2020, varying from decreases of 12% (Budget 3 companies) to 43% (Budget 1 companies) — corresponding to reductions in performance activity. Budget 5 companies, on average, reported a small increase in marketing expenses, but these companies were unlikely to have marketing staff.
  - Despite the many major shifts that emerged as a direct result of the pandemic, the ratio of personnel to non-personnel expenditures held firm between 60% and 70% across all budget groups in FY2019, FY2020, and FY2021, demonstrating the consistency of this key industry ratio.
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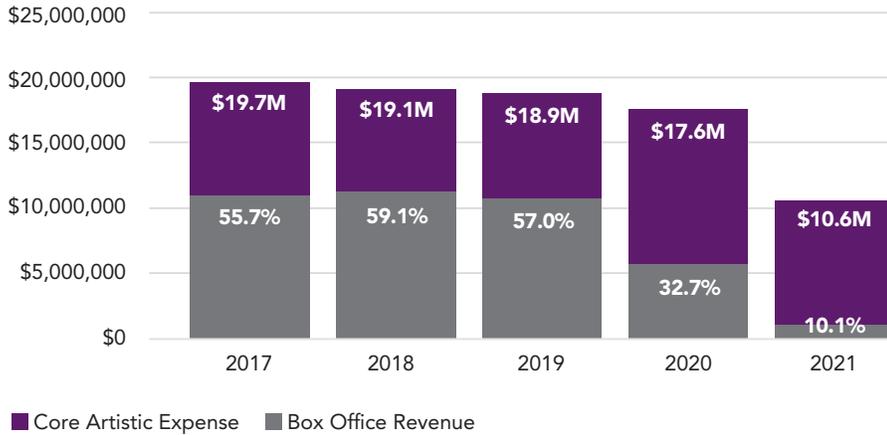
## OPI vs. CPI

- OPERA America defines the annualized growth rate of opera company budgets as the Opera Price Index (OPI). This measure can be compared to the Consumer Price Index (CPI) to analyze how the cost of operating an opera company has increased relative to the general cost of living. For companies that are consistent over time in the number and size of productions and performances offered each season, the OPI is generally 200% to 300% higher than the CPI. For the five years covered in this report (FY2017–FY2021), the OPI *declined* by 11.36% while the CPI increased by an annualized 2.54%, demonstrating the impact of COVID-19 on the industry.

# Budget 1

## Average Program Coverage

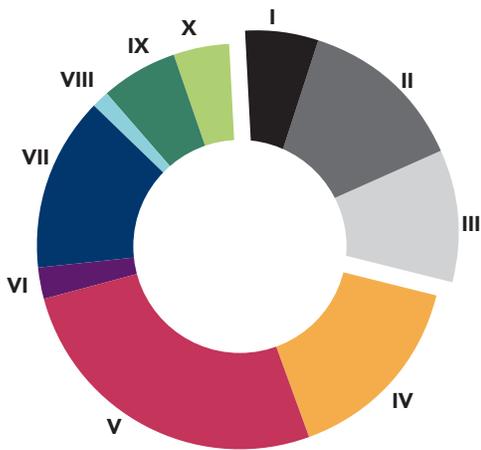
Program coverage is the amount of core artistic expenses covered by box office



## Average Activity

\$26,537,865
<b>OPERATING REVENUE</b>
\$23,366,333
<b>OPERATING EXPENSES</b>
5,268
<b>TICKETS SOLD</b>
6,842
<b>SEATS AVAILABLE</b>
77.0%
<b>CAPACITY SOLD</b>
1.3
<b>PRODUCTIONS</b>
11
<b>PERFORMANCES</b>

## Revenue Breakdown



### EARNED (29.5%)

- I Box Office: \$1,069,816 (5.8%)
- II Investment: \$2,480,803 (13.4%)
- III Other Earned: \$1,959,918 (10.6%)

### CONTRIBUTED (70.2%)

- IV Board: \$2,848,038 (15.4%)
- V Individuals: \$4,923,938 (26.6%)
- VI Corporate: \$476,473 (2.6%)
- VII Foundation: \$2,532,099 (13.7%)
- VIII In Kind: \$277,293 (1.5%)
- IX Government\*: \$1,135,620 (6.1%)
- X Other Contrib.: \$835,947 (4.5%)

## Expense Breakdown

### PROGRAM\*\* (70.0%)

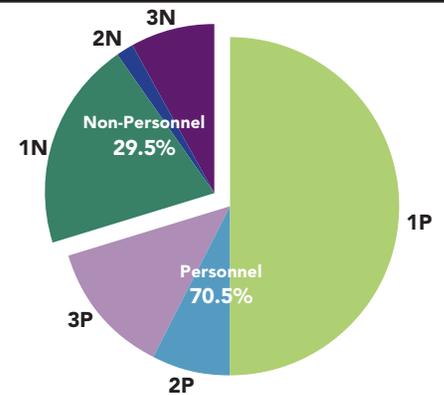
- 1P. Personnel: \$11,685,664 (50.0%)
- 1N. Non-Personnel: \$4,665,693 (20.0%)

### DEVELOPMENT (9.4%)

- 2P. Personnel: \$1,787,558 (7.7%)
- 2N. Non-Personnel: \$392,133 (1.7%)

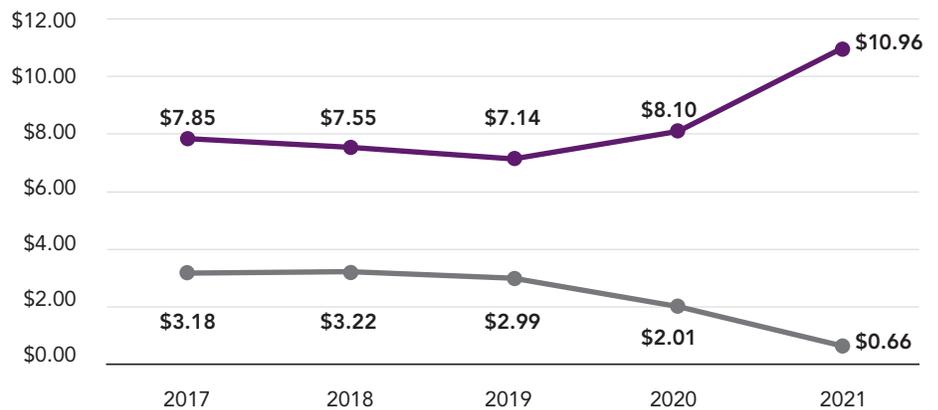
### GENERAL/ADMINISTRATIVE (20.6%)

- 3P. Personnel: \$3,002,569 (12.8%)
- 3N. Non-Personnel: \$1,832,717 (7.8%)



## Average Development & Marketing Productivity

- Development Productivity: Dollars raised from contributions per dollar spent on fundraising.
- Marketing Productivity: Dollars earned from box office revenue per dollar spent on marketing.



\*Some companies recorded COVID-19 government relief funds as support in FY2020 and FY2021 upon notification of loan forgiveness. Remaining government relief funds will be reflected in the FY2022 Annual Field Report.

\*\*For the purposes of this report, marketing expenses are included in program expenses.

# ANNUAL BUDGET OVER \$15,000,000

Fiscal Year	2017	2018	2019	2020	2021	5-yr average	1-yr change	5-yr change
<b>FINANCIAL OVERVIEW</b>								
Operating Revenue	\$ 39,070,905	\$ 39,558,664	\$ 39,223,277	\$ 34,017,025	\$ 26,537,865	\$ 35,681,547	-22.0%	-32.1%
Operating Expenses	\$ 39,483,211	\$ 39,220,498	\$ 38,830,363	\$ 34,565,118	\$ 23,366,333	\$ 35,093,105	-32.4%	-40.8%
<b>Net Operating Income</b>	<b>\$ -412,306</b>	<b>\$ 338,166</b>	<b>\$ 392,914</b>	<b>\$ -548,093</b>	<b>\$ 3,171,532</b>	<b>\$ 588,443</b>	<b>+678.6%</b>	<b>+869.2%</b>
as % of Expenses	-1.0%	0.9%	1.0%	-1.6%	13.6%	2.6%	--	--
<b>OPERATING REVENUE</b>								
<b>UNRESTRICTED EARNED REVENUE</b>								
Box Office	\$ 10,962,980	\$ 11,261,705	\$ 10,757,613	\$ 5,743,645	\$ 1,069,816	\$ 7,959,151	-81.4%	-90.2%
Investments	\$ 2,331,642	\$ 1,883,788	\$ 2,706,444	\$ 2,818,443	\$ 2,480,803	\$ 2,444,224	-12.0%	+6.4%
Other Earned Revenue	\$ 2,495,751	\$ 3,145,828	\$ 2,968,593	\$ 2,342,090	\$ 1,959,918	\$ 2,582,436	-16.3%	-21.5%
<b>Total Earned Revenue</b>	<b>\$ 15,790,373</b>	<b>\$ 16,291,320</b>	<b>\$ 16,432,650</b>	<b>\$ 10,904,177</b>	<b>\$ 5,510,537</b>	<b>\$ 12,985,811</b>	<b>-49.5%</b>	<b>-65.1%</b>
<b>UNRESTRICTED CONTRIBUTED REVENUE</b>								
Board	\$ 4,100,293	\$ 4,793,038	\$ 5,696,789	\$ 3,980,936	\$ 2,848,038	\$ 4,283,819	-28.5%	-30.5%
Individual	\$ 3,927,034	\$ 3,744,403	\$ 3,986,230	\$ 4,548,087	\$ 4,923,938	\$ 4,225,938	+8.3%	+25.4%
Corporate	\$ 833,052	\$ 766,450	\$ 897,937	\$ 609,598	\$ 476,473	\$ 716,702	-21.8%	-42.8%
Foundation	\$ 2,152,261	\$ 3,172,847	\$ 3,090,541	\$ 3,090,160	\$ 2,532,099	\$ 2,807,582	-18.1%	+17.6%
In Kind	\$ 685,701	\$ 476,052	\$ 317,625	\$ 600,213	\$ 277,293	\$ 471,377	-53.8%	-59.6%
Other Private Support	\$ 611,998	\$ 219,819	\$ 469,169	\$ 158,760	\$ 835,947	\$ 459,138	+426.5%	+36.6%
<b>Total Private Support</b>	<b>\$ 12,310,339</b>	<b>\$ 13,172,609</b>	<b>\$ 14,458,290</b>	<b>\$ 12,987,755</b>	<b>\$ 11,893,788</b>	<b>\$ 12,964,556</b>	<b>-8.4%</b>	<b>-3.4%</b>
<b>Total Government Support*</b>	<b>\$ 344,587</b>	<b>\$ 186,227</b>	<b>\$ 306,550</b>	<b>\$ 1,800,247</b>	<b>\$ 1,135,620</b>	<b>\$ 754,646</b>	<b>-36.9%</b>	<b>+229.6%</b>
<b>Total Contributed Revenue</b>	<b>\$ 12,654,926</b>	<b>\$ 13,358,835</b>	<b>\$ 14,764,841</b>	<b>\$ 14,788,002</b>	<b>\$ 13,029,407</b>	<b>\$ 13,719,202</b>	<b>-11.9%</b>	<b>+3.0%</b>
<b>REVENUE SUMMARY</b>								
Net Assets Released from Restriction	\$ 10,625,606	\$ 9,908,509	\$ 8,025,786	\$ 8,324,846	\$ 7,997,922	\$ 8,976,534	-3.9%	-24.7%
<b>Total Operating Revenue</b>	<b>\$ 39,070,905</b>	<b>\$ 39,558,664</b>	<b>\$ 39,223,277</b>	<b>\$ 34,017,025</b>	<b>\$ 26,537,865</b>	<b>\$ 35,681,547</b>	<b>-22.0%</b>	<b>-32.1%</b>
<b>OPERATING EXPENSES</b>								
<b>PERSONNEL</b>								
Program**	\$ 22,296,330	\$ 22,581,438	\$ 22,499,183	\$ 20,548,423	\$ 11,685,664	\$ 19,922,207	-43.1%	-47.6%
Development	\$ 1,773,021	\$ 1,972,687	\$ 2,132,909	\$ 2,158,934	\$ 1,787,558	\$ 1,965,022	-17.2%	+0.8%
General/Administrative	\$ 2,677,641	\$ 2,632,064	\$ 2,697,371	\$ 3,033,167	\$ 3,002,569	\$ 2,808,562	-1.0%	+12.1%
<b>Total Personnel Expenses</b>	<b>\$ 26,746,992</b>	<b>\$ 27,186,189</b>	<b>\$ 27,329,462</b>	<b>\$ 25,740,524</b>	<b>\$ 16,475,790</b>	<b>\$ 24,695,792</b>	<b>-36.0%</b>	<b>-38.4%</b>
<b>NON-PERSONNEL</b>								
Program**	\$ 8,312,511	\$ 8,246,581	\$ 7,937,732	\$ 5,986,216	\$ 4,665,693	\$ 7,029,746	-22.1%	-43.9%
Development	\$ 1,224,131	\$ 1,043,265	\$ 1,069,773	\$ 675,376	\$ 392,133	\$ 880,936	-41.9%	-68.0%
General/Administrative	\$ 3,199,576	\$ 2,744,464	\$ 2,493,395	\$ 2,163,002	\$ 1,832,717	\$ 2,486,631	-15.3%	-42.7%
<b>Total Non-Personnel Expenses</b>	<b>\$ 12,736,218</b>	<b>\$ 12,034,309</b>	<b>\$ 11,500,900</b>	<b>\$ 8,824,593</b>	<b>\$ 6,890,543</b>	<b>\$ 10,397,313</b>	<b>-21.9%</b>	<b>-45.9%</b>
<b>EXPENSES SUMMARY</b>								
<b>Total Operating Expenses</b>	<b>\$ 39,483,211</b>	<b>\$ 39,220,498</b>	<b>\$ 38,830,363</b>	<b>\$ 34,565,118</b>	<b>\$ 23,366,333</b>	<b>\$ 35,093,105</b>	<b>-32.4%</b>	<b>-40.8%</b>

# Budget 1

ANNUAL BUDGET OVER \$15,000,000

Fiscal Year	2017	2018	2019	2020	2021	5-yr average	1-yr change	5-yr change
<b>BALANCE SHEET</b>								
<b>NET ASSETS</b>								
Unrestricted	\$ 25,880,009	\$ 29,729,339	\$ 33,724,890	\$ 30,892,058	\$ 37,560,203	\$ 31,557,300	+21.6%	+45.1%
Restricted	\$ 76,267,944	\$ 77,038,499	\$ 74,554,917	\$ 76,456,319	\$ 101,154,117	\$ 81,094,359	+32.3%	+32.6%
<b>Total Net Assets</b>	<b>\$ 102,147,953</b>	<b>\$ 106,767,838</b>	<b>\$ 108,279,807</b>	<b>\$ 107,348,377</b>	<b>\$ 138,714,320</b>	<b>\$ 112,651,659</b>	<b>+29.2%</b>	<b>+35.8%</b>
as % of Expenses	258.7%	272.2%	278.9%	310.6%	593.7%	342.8%	--	--
<b>Working Capital</b>	<b>\$ 42,863,125</b>	<b>\$ 43,499,754</b>	<b>\$ 43,643,800</b>	<b>\$ 47,341,269</b>	<b>\$ 65,071,334</b>	<b>\$ 48,483,856</b>	<b>+37.5%</b>	<b>+51.8%</b>
as % of Expenses	108.6%	110.9%	112.4%	137.0%	278.5%	149.5%	--	--
<b>Investments</b>	<b>\$ 72,149,921</b>	<b>\$ 76,380,662</b>	<b>\$ 78,823,130</b>	<b>\$ 78,882,560</b>	<b>\$ 106,222,078</b>	<b>\$ 82,491,670</b>	<b>+34.7%</b>	<b>+47.2%</b>
as % of Expenses	182.7%	194.7%	203.0%	228.2%	454.6%	252.7%	--	--
<b>Net Fixed Assets</b>	<b>\$ 26,683,624</b>	<b>\$ 30,194,248</b>	<b>\$ 31,551,865</b>	<b>\$ 30,324,919</b>	<b>\$ 29,800,358</b>	<b>\$ 29,711,003</b>	<b>-1.7%</b>	<b>+11.7%</b>
<b>ENDOWMENTS AND RESERVE FUNDS</b>								
<b>Balance</b>	<b>\$ 74,783,448</b>	<b>\$ 77,719,828</b>	<b>\$ 78,618,400</b>	<b>\$ 83,852,866</b>	<b>\$ 100,803,588</b>	<b>\$ 83,155,626</b>	<b>+20.2%</b>	<b>+34.8%</b>
as % of Expenses	189.4%	198.2%	202.5%	242.6%	431.4%	252.8%	--	--
<b>PERFORMANCE ACTIVITY</b>								
<b>PERFORMANCES</b>								
Main Season Productions	6.5	6.8	6.8	4.0	1.3	5.1	-68.8%	-80.8%
Main Season Performances	44	43	43	25	11	33	-55.4%	-74.4%
<b>ATTENDANCE</b>								
Main Season Attendance	93,167	91,940	91,150	48,075	5,268	65,920	-89.0%	-94.3%
Total Seats Available	120,006	118,571	121,557	68,927	6,842	87,180	-90.1%	-94.3%
% of Capacity Sold	77.6%	77.5%	75.0%	69.7%	77.0%	75.4%	+10.4%	-0.8%
<b>PRICING</b>								
High Ticket Price	\$ 316.57	\$ 365.86	\$ 344.76	\$ 323.00	\$ 199.71	\$ 309.98	-38.2%	-36.9%
Low Ticket Price	\$ 17.29	\$ 19.86	\$ 21.71	\$ 23.86	\$ 25.29	\$ 21.60	+6.0%	+46.3%
Average Yield per Ticket Sold*	\$ 117.67	\$ 122.49	\$ 118.02	\$ 112.21	\$ 135.35	\$ 121.15	+20.6%	+15.0%

**CONSTANT SAMPLE GROUP BASED ON DATA REPORTED FROM:\*\***

The Dallas Opera | Detroit Opera | Houston Grand Opera | Los Angeles Opera | Lyric Opera of Chicago  
 San Francisco Opera | The Santa Fe Opera | Seattle Opera

\* For FY2020 and FY2021, yield per ticket sold excludes box office revenue from alternate programming, which accounted for a disproportionate amount of box office revenue compared to in pre-pandemic seasons.

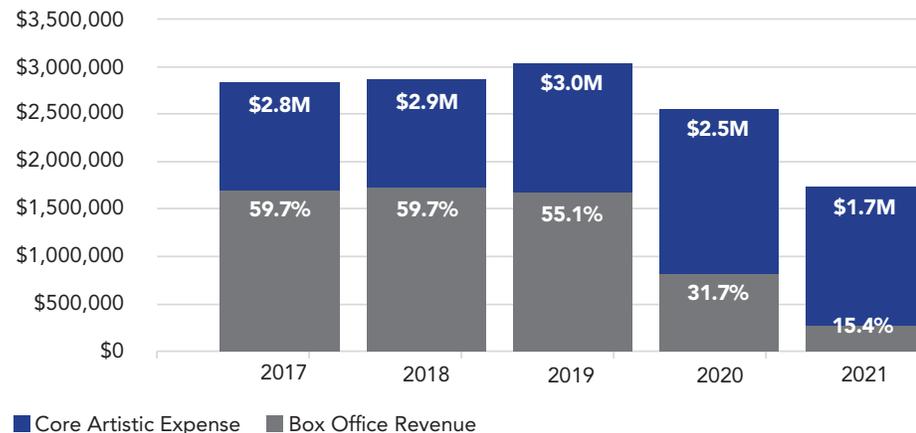
\*\* The Metropolitan Opera and Washington National Opera have been excluded from the Constant Sample Group since they would skew the Budget 1 average (due to The Met's budget size and the structure of WNO as part of the Kennedy Center).

# Budget 2

BETWEEN \$3,000,000 AND \$15,000,000

## Average Program Coverage

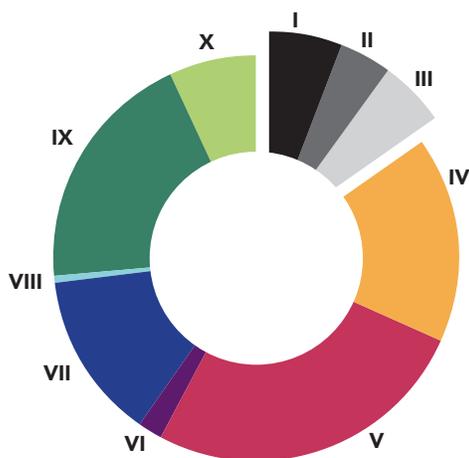
Program coverage is the amount of core artistic expenses covered by box office



## Average Activity

\$5,570,316
<b>OPERATING REVENUE</b>
\$4,805,098
<b>OPERATING EXPENSES</b>
2,728
<b>TICKETS SOLD</b>
4,980
<b>SEATS AVAILABLE</b>
54.8%
<b>CAPACITY SOLD</b>
2.1
<b>PRODUCTIONS</b>
9.1
<b>PERFORMANCES</b>

## Revenue Breakdown



### EARNED (15.4%)

- I Box Office: \$268,360 (6.1%)
- II Investment: \$181,296 (4.1%)
- III Other Earned: \$225,725 (5.2%)

### CONTRIBUTED (84.6%)

- IV Board: \$721,577 (16.5%)
- V Individuals: \$1,140,250 (26.0%)
- VI Corporate: \$86,855 (2.0%)
- VII Foundation: \$575,163 (13.1%)
- VIII In Kind: \$31,917 (0.7%)
- IX Government\*: \$843,867 (19.3%)
- X Other Contrib.: \$303,405 (6.9%)

## Expense Breakdown

### PROGRAM\*\* (65.6%)

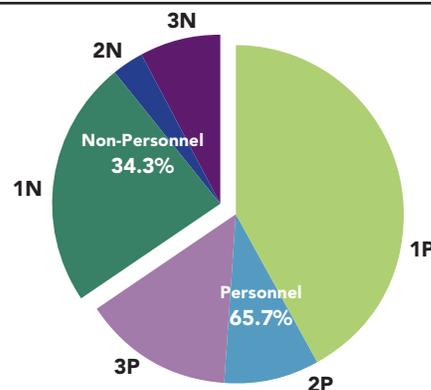
- 1P. Personnel: \$2,018,514 (42.0%)
- 1N. Non-Personnel: \$1,135,653 (23.6%)

### DEVELOPMENT (12.0%)

- 2P. Personnel: \$439,447 (9.1%)
- 2N. Non-Personnel: \$140,453 (2.9%)

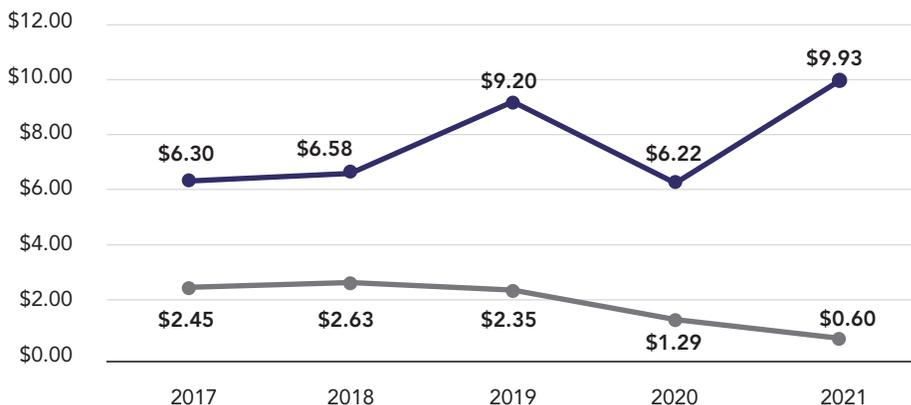
### GENERAL/ADMINISTRATIVE (22.2%)

- 3P. Personnel: \$698,706 (14.5%)
- 3N. Non-Personnel: \$372,326 (7.7%)



## Average Development & Marketing Productivity

- Development Productivity: Dollars raised from contributions per dollar spent on fundraising.
- Marketing Productivity: Dollars earned from box office revenue per dollar spent on marketing.



\*Some companies recorded COVID-19 government relief funds as support in FY2020 and FY2021 upon notification of loan forgiveness. Remaining government relief funds will be reflected in the FY2022 Annual Field Report.

\*\*For the purposes of this report, marketing expenses are included in program expenses.

# Budget 2

Fiscal Year	2017	2018	2019	2020	2021	5-yr average	1-yr change	5-yr change
<b>FINANCIAL OVERVIEW</b>								
Operating Revenue	\$ 7,378,900	\$ 7,323,999	\$ 7,813,111	\$ 6,290,868	\$ 5,570,316	\$ 6,875,439	-11.5%	-24.5%
Operating Expenses	\$ 7,189,953	\$ 7,842,420	\$ 7,612,602	\$ 6,045,945	\$ 4,805,098	\$ 6,699,204	-20.5%	-33.2%
<b>Net Operating Income</b>	<b>\$ 188,947</b>	<b>\$ -518,421</b>	<b>\$ 200,509</b>	<b>\$ 244,923</b>	<b>\$ 765,217</b>	<b>\$ 176,235</b>	<b>+212.4%</b>	<b>+305.0%</b>
as % of Expenses	2.6%	-6.6%	2.6%	4.1%	15.9%	3.7%	--	--
<b>OPERATING REVENUE</b>								
<b>UNRESTRICTED EARNED REVENUE</b>								
Box Office	\$ 1,694,296	\$ 1,716,671	\$ 1,670,002	\$ 809,153	\$ 268,360	\$ 1,231,696	-66.8%	-84.2%
Investments	\$ 338,413	\$ 328,589	\$ 208,215	\$ 118,938	\$ 181,296	\$ 235,090	+52.4%	-46.4%
Other Earned Revenue	\$ 345,585	\$ 393,973	\$ 414,797	\$ 252,566	\$ 225,725	\$ 326,529	-10.6%	-34.7%
<b>Total Earned Revenue</b>	<b>\$ 2,378,294</b>	<b>\$ 2,439,233</b>	<b>\$ 2,293,013</b>	<b>\$ 1,180,657</b>	<b>\$ 675,381</b>	<b>\$ 1,793,315</b>	<b>-42.8%</b>	<b>-71.6%</b>
<b>UNRESTRICTED CONTRIBUTED REVENUE</b>								
Board	\$ 873,981	\$ 905,888	\$ 959,251	\$ 753,914	\$ 721,577	\$ 842,922	-4.3%	-17.4%
Individual	\$ 1,324,980	\$ 1,449,542	\$ 1,605,888	\$ 1,505,119	\$ 1,140,250	\$ 1,405,156	-24.2%	-13.9%
Corporate	\$ 168,098	\$ 152,851	\$ 124,916	\$ 111,793	\$ 86,855	\$ 128,903	-22.3%	-48.3%
Foundation	\$ 607,747	\$ 583,473	\$ 970,896	\$ 568,512	\$ 575,163	\$ 661,158	+1.2%	-5.4%
In Kind	\$ 62,702	\$ 81,598	\$ 55,747	\$ 49,018	\$ 31,917	\$ 56,196	-34.9%	-49.1%
Other Private Support	\$ 283,754	\$ 363,510	\$ 308,627	\$ 404,866	\$ 303,405	\$ 332,833	-25.1%	+6.9%
<b>Total Private Support</b>	<b>\$ 3,321,262</b>	<b>\$ 3,536,863</b>	<b>\$ 4,025,326</b>	<b>\$ 3,393,222</b>	<b>\$ 2,859,168</b>	<b>\$ 3,427,168</b>	<b>-15.7%</b>	<b>-13.9%</b>
<b>Total Government Support*</b>	<b>\$ 211,707</b>	<b>\$ 214,428</b>	<b>\$ 204,887</b>	<b>\$ 352,649</b>	<b>\$ 843,867</b>	<b>\$ 365,508</b>	<b>+139.3%</b>	<b>+298.6%</b>
<b>Total Contributed Revenue</b>	<b>\$ 3,532,969</b>	<b>\$ 3,751,291</b>	<b>\$ 4,230,213</b>	<b>\$ 3,745,871</b>	<b>\$ 3,703,035</b>	<b>\$ 3,792,676</b>	<b>-1.1%</b>	<b>+4.8%</b>
<b>REVENUE SUMMARY</b>								
Net Assets Released from Restriction	\$ 1,467,636	\$ 1,133,475	\$ 1,289,884	\$ 1,364,340	\$ 1,191,900	\$ 1,289,447	-12.6%	-18.8%
<b>Total Operating Revenue</b>	<b>\$ 7,378,900</b>	<b>\$ 7,323,999</b>	<b>\$ 7,813,111</b>	<b>\$ 6,290,868</b>	<b>\$ 5,570,316</b>	<b>\$ 6,875,439</b>	<b>-11.5%</b>	<b>-24.5%</b>
<b>OPERATING EXPENSES</b>								
<b>PERSONNEL</b>								
Program**	\$ 3,363,416	\$ 3,638,329	\$ 3,588,396	\$ 2,743,616	\$ 2,018,514	\$ 3,070,454	-26.4%	-40.0%
Development	\$ 449,465	\$ 536,932	\$ 500,701	\$ 511,354	\$ 439,447	\$ 487,580	-14.1%	-2.2%
General/Administrative	\$ 622,200	\$ 624,954	\$ 629,918	\$ 617,788	\$ 698,706	\$ 638,713	+13.1%	+12.3%
<b>Total Personnel Expenses</b>	<b>\$ 4,435,080</b>	<b>\$ 4,800,216</b>	<b>\$ 4,719,015</b>	<b>\$ 3,872,758</b>	<b>\$ 3,156,666</b>	<b>\$ 4,196,747</b>	<b>-18.5%</b>	<b>-28.8%</b>
<b>NON-PERSONNEL</b>								
Program**	\$ 1,914,789	\$ 2,099,812	\$ 2,110,116	\$ 1,477,191	\$ 1,135,653	\$ 1,747,512	-23.1%	-40.7%
Development	\$ 269,567	\$ 281,114	\$ 262,972	\$ 227,098	\$ 140,453	\$ 236,241	-38.2%	-47.9%
General/Administrative	\$ 570,516	\$ 661,279	\$ 520,499	\$ 468,899	\$ 372,326	\$ 518,704	-20.6%	-34.7%
<b>Total Non-Personnel Expenses</b>	<b>\$ 2,754,873</b>	<b>\$ 3,042,204</b>	<b>\$ 2,893,587</b>	<b>\$ 2,173,188</b>	<b>\$ 1,648,432</b>	<b>\$ 2,502,457</b>	<b>-24.1%</b>	<b>-40.2%</b>
<b>EXPENSES SUMMARY</b>								
<b>Total Operating Expenses</b>	<b>\$ 7,189,953</b>	<b>\$ 7,842,420</b>	<b>\$ 7,612,602</b>	<b>\$ 6,045,945</b>	<b>\$ 4,805,098</b>	<b>\$ 6,699,204</b>	<b>-20.5%</b>	<b>-33.2%</b>

\* Some companies recorded COVID-19 government relief funds as support in FY2020 and FY2021 upon notification of loan forgiveness. Remaining government relief funds will be reflected in the FY2022 Annual Field Report.

\*\* For the purposes of this report, marketing expenses are included in program expenses.

## BETWEEN \$3,000,000 AND \$15,000,000

Fiscal Year	2017	2018	2019	2020	2021	5-yr average	1-yr change	5-yr change
<b>BALANCE SHEET</b>								
<b>NET ASSETS</b>								
Unrestricted	\$ 3,758,955	\$ 2,910,841	\$ 3,440,987	\$ 3,787,189	\$ 4,778,532	\$ 3,735,301	+26.2%	+27.1%
Restricted	\$ 8,816,338	\$ 9,758,582	\$ 10,122,038	\$ 12,157,884	\$ 14,547,431	\$ 11,080,454	+19.7%	+65.0%
<b>Total Net Assets</b>	<b>\$ 12,575,292</b>	<b>\$ 12,669,423</b>	<b>\$ 13,563,025</b>	<b>\$ 15,945,072</b>	<b>\$ 19,325,963</b>	<b>\$ 14,815,755</b>	<b>+21.2%</b>	<b>+53.7%</b>
as % of Expenses	174.9%	161.5%	178.2%	263.7%	402.2%	236.1%	--	--
<b>Working Capital</b>	<b>\$ 4,901,342</b>	<b>\$ 4,533,828</b>	<b>\$ 4,945,954</b>	<b>\$ 8,038,221</b>	<b>\$ 8,623,253</b>	<b>\$ 6,208,520</b>	<b>+7.3%</b>	<b>+75.9%</b>
as % of Expenses	68.2%	57.8%	65.0%	133.0%	179.5%	100.7%	--	--
<b>Investments</b>	<b>\$ 8,876,470</b>	<b>\$ 8,798,391</b>	<b>\$ 8,720,187</b>	<b>\$ 10,888,394</b>	<b>\$ 13,400,306</b>	<b>\$ 10,136,749</b>	<b>+23.1%</b>	<b>+51.0%</b>
as % of Expenses	123.5%	112.2%	114.5%	180.1%	278.9%	161.8%	--	--
<b>Net Fixed Assets</b>	<b>\$ 2,514,361</b>	<b>\$ 2,496,730</b>	<b>\$ 2,934,295</b>	<b>\$ 2,694,531</b>	<b>\$ 2,679,883</b>	<b>\$ 2,663,960</b>	<b>-0.5%</b>	<b>+6.6%</b>
<b>ENDOWMENTS AND RESERVE FUNDS</b>								
<b>Balance</b>	<b>\$ 9,962,824</b>	<b>\$ 9,927,988</b>	<b>\$ 10,211,056</b>	<b>\$ 12,460,690</b>	<b>\$ 14,767,082</b>	<b>\$ 11,465,928</b>	<b>+18.5%</b>	<b>+48.2%</b>
as % of Expenses	138.6%	126.6%	134.1%	206.1%	307.3%	182.5%	--	--
<b>PERFORMANCE ACTIVITY</b>								
<b>PERFORMANCES</b>								
Main Season Productions	4.5	4.7	4.4	2.5	2.1	3.7	-17.2%	-53.4%
Main Season Performances	21	24	23	11	9.1	17	-15.4%	-56.1%
<b>ATTENDANCE</b>								
Main Season Attendance	20,909	20,238	19,645	9,548	2,728	14,614	-71.4%	-87.0%
Total Seats Available	30,283	31,346	29,708	15,967	4,980	22,457	-68.8%	-83.6%
% of Capacity Sold	69.0%	64.6%	66.1%	59.8%	54.8%	62.9%	-8.4%	-20.7%
<b>PRICING</b>								
High Ticket Price	\$ 181.96	\$ 174.55	\$ 185.71	\$ 190.67	\$ 112.85	\$ 169.15	-40.8%	-38.0%
Low Ticket Price	\$ 19.63	\$ 19.03	\$ 19.73	\$ 19.95	\$ 25.75	\$ 20.82	+29.1%	+31.2%
Average Yield per Ticket Sold*	\$ 81.03	\$ 84.82	\$ 85.01	\$ 79.96	\$ 68.45	\$ 79.86	-14.4%	-15.5%

### CONSTANT SAMPLE GROUP BASED ON DATA REPORTED FROM:

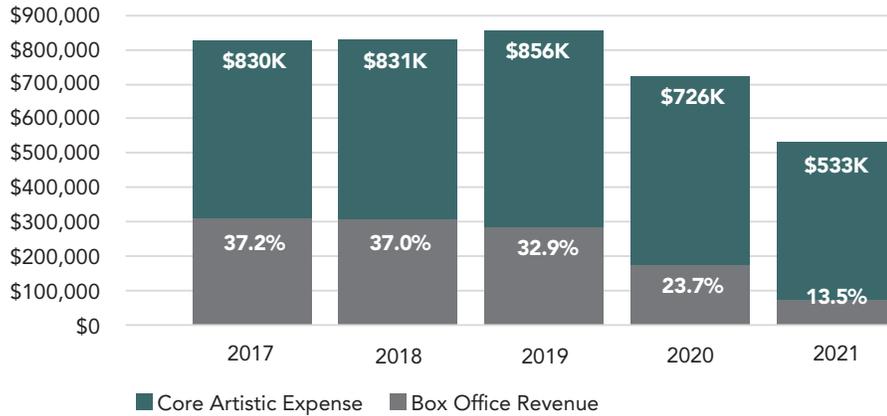
Arizona Opera | The Atlanta Opera | Austin Opera | Boston Lyric Opera | Central City Opera | Cincinnati Opera  
 Des Moines Metro Opera | Florida Grand Opera | The Glimmerglass Festival | Hawai'i Opera Theatre  
 Lyric Opera of Kansas City | Minnesota Opera | New Orleans Opera | Opera Colorado | Opera Omaha  
 Opera Philadelphia | Opera San José | Opera Theatre of Saint Louis | Palm Beach Opera | Pittsburgh Opera  
 Portland Opera | San Diego Opera | Sarasota Opera | Utah Symphony | Utah Opera

\* For FY2020 and FY2021, yield per ticket sold excludes box office revenue from alternate programming, which accounted for a disproportionate amount of box office revenue compared to in pre-pandemic seasons.

# Budget 3

## Average Program Coverage

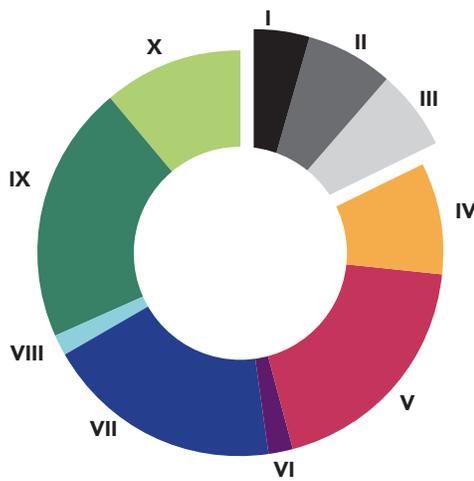
Program coverage is the amount of core artistic expenses covered by box office



## Average Activity

\$1,715,716
<b>OPERATING REVENUE</b>
\$1,308,965
<b>OPERATING EXPENSES</b>
1,292
<b>TICKETS SOLD</b>
3,048
<b>SEATS AVAILABLE</b>
42.4%
<b>CAPACITY SOLD</b>
1.4
<b>PRODUCTIONS</b>
3.5
<b>PERFORMANCES</b>

## Revenue Breakdown



### EARNED (18.0%)

- I Box Office: \$71,836 (4.6%)
- II Investment: \$109,551 (7.1%)
- III Other Earned: \$97,197 (6.3%)

### CONTRIBUTED (82.0%)

- IV Board: \$143,860 (9.3%)
- V Individuals: \$285,673 (18.4%)
- VI Corporate: \$29,892 (1.9%)
- VII Foundation: \$292,241 (18.9%)
- VIII In Kind: \$28,063 (1.8%)
- IX Government\*: \$318,338 (20.5%)
- X Other Contrib.: \$172,883 (11.2%)

## Expense Breakdown

### PROGRAM\*\* (66.0%)

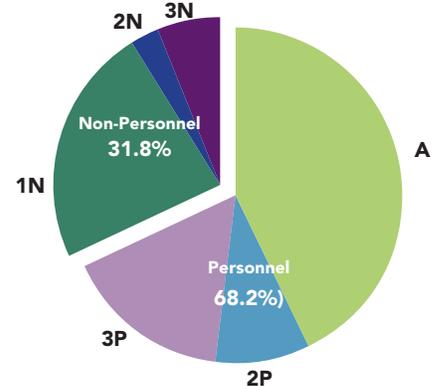
- 1P. Personnel: \$562,450 (43.0%)
- 1N. Non-Personnel: \$301,677 (23.0%)

### DEVELOPMENT (11.9%)

- 2P. Personnel: \$120,083 (9.2%)
- 2N. Non-Personnel: \$34,751 (2.7%)

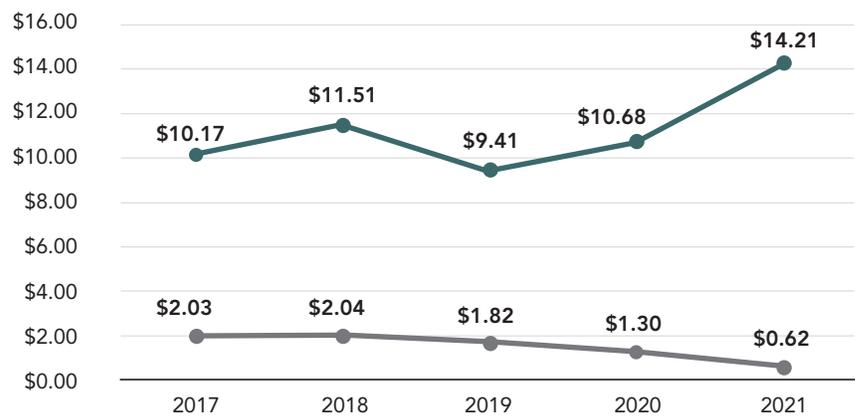
### GENERAL/ADMINISTRATIVE (22.1%)

- 3P. Personnel: \$209,780 (16.0%)
- 3N. Non-Personnel: \$80,224 (6.1%)



## Average Development & Marketing Productivity

- Development Productivity: Dollars raised from contributions per dollar spent on fundraising.
- Marketing Productivity: Dollars earned from box office revenue per dollar spent on



\*Some companies recorded COVID-19 government relief funds as support in FY2020 and FY2021 upon notification of loan forgiveness. Remaining government relief funds will be reflected in the FY2022 Annual Field Report.

\*\*For the purposes of this report, marketing expenses are included in program expenses.

## BETWEEN \$1,000,000 AND \$3,000,000

Fiscal Year	2017	2018	2019	2020	2021	5-yr average	1-yr change	5-yr change
<b>FINANCIAL OVERVIEW</b>								
Operating Revenue	\$ 1,920,653	\$ 1,896,457	\$ 2,103,480	\$ 1,656,997	\$ 1,723,522	\$ 1,860,222	+4.0%	-10.3%
Operating Expenses	\$ 2,026,745	\$ 1,976,846	\$ 1,983,153	\$ 1,647,132	\$ 1,308,965	\$ 1,788,568	-20.5%	-35.4%
<b>Net Operating Income</b>	<b>\$ -106,092</b>	<b>\$ -80,389</b>	<b>\$ 120,327</b>	<b>\$ 9,866</b>	<b>\$ 414,557</b>	<b>\$ 71,654</b>	<b>+4,102.0%</b>	<b>+490.8%</b>
as % of Expenses	-5.2%	-4.1%	6.1%	0.6%	31.7%	5.8%	--	--
<b>OPERATING REVENUE</b>								
<b>UNRESTRICTED EARNED REVENUE</b>								
Box Office	\$ 308,607	\$ 307,751	\$ 281,886	\$ 172,326	\$ 71,836	\$ 228,481	-58.3%	-76.7%
Investments	\$ 27,987	\$ 16,796	\$ 17,840	\$ 37,595	\$ 109,551	\$ 41,954	+191.4%	+291.4%
Other Earned Revenue	\$ 191,848	\$ 206,445	\$ 196,493	\$ 114,536	\$ 97,197	\$ 161,304	-15.1%	-49.3%
<b>Total Earned Revenue</b>	<b>\$ 528,442</b>	<b>\$ 530,993</b>	<b>\$ 496,218</b>	<b>\$ 324,457</b>	<b>\$ 278,584</b>	<b>\$ 431,739</b>	<b>-14.1%</b>	<b>-47.3%</b>
<b>UNRESTRICTED CONTRIBUTED REVENUE</b>								
Board	\$ 222,663	\$ 219,945	\$ 249,637	\$ 171,285	\$ 143,860	\$ 201,478	-16.0%	-35.4%
Individual	\$ 318,388	\$ 240,870	\$ 430,025	\$ 333,092	\$ 285,673	\$ 321,610	-14.2%	-10.3%
Corporate	\$ 76,212	\$ 66,263	\$ 60,634	\$ 36,697	\$ 29,892	\$ 53,940	-18.5%	-60.8%
Foundation	\$ 264,482	\$ 261,654	\$ 412,640	\$ 333,996	\$ 292,241	\$ 313,003	-12.5%	+10.5%
In Kind	\$ 42,158	\$ 61,395	\$ 45,351	\$ 28,644	\$ 28,063	\$ 41,122	-2.0%	-33.4%
Other Private Support	\$ 150,218	\$ 164,238	\$ 100,788	\$ 117,437	\$ 172,883	\$ 141,113	+47.2%	+15.1%
<b>Total Private Support</b>	<b>\$ 1,074,121</b>	<b>\$ 1,014,365</b>	<b>\$ 1,299,075</b>	<b>\$ 1,021,151</b>	<b>\$ 952,613</b>	<b>\$ 1,072,265</b>	<b>-6.7%</b>	<b>-11.3%</b>
<b>Total Government Support*</b>	<b>\$ 106,999</b>	<b>\$ 95,963</b>	<b>\$ 92,320</b>	<b>\$ 113,650</b>	<b>\$ 318,338</b>	<b>\$ 145,454</b>	<b>+180.1%</b>	<b>+197.5%</b>
<b>Total Contributed Revenue</b>	<b>\$ 1,181,121</b>	<b>\$ 1,110,327</b>	<b>\$ 1,391,395</b>	<b>\$ 1,134,802</b>	<b>\$ 1,270,951</b>	<b>\$ 1,217,719</b>	<b>+12.0%</b>	<b>+7.6%</b>
<b>REVENUE SUMMARY</b>								
Net Assets Released from Restriction	\$ 211,090	\$ 255,137	\$ 215,867	\$ 197,739	\$ 166,182	\$ 209,203	-16.0%	-21.3%
<b>Total Operating Revenue</b>	<b>\$ 1,920,653</b>	<b>\$ 1,896,457</b>	<b>\$ 2,103,480</b>	<b>\$ 1,656,997</b>	<b>\$ 1,715,716</b>	<b>\$ 1,858,661</b>	<b>+3.5%</b>	<b>-10.7%</b>
<b>OPERATING EXPENSES</b>								
<b>PERSONNEL</b>								
Program**	\$ 828,064	\$ 834,850	\$ 859,798	\$ 767,903	\$ 562,450	\$ 770,613	-26.8%	-32.1%
Development	\$ 122,568	\$ 113,257	\$ 129,122	\$ 119,393	\$ 120,083	\$ 120,884	+0.6%	-2.0%
General/Administrative	\$ 194,767	\$ 201,724	\$ 185,068	\$ 176,685	\$ 209,780	\$ 193,605	+18.7%	+7.7%
<b>Total Personnel Expenses</b>	<b>\$ 1,145,399</b>	<b>\$ 1,149,830</b>	<b>\$ 1,173,987</b>	<b>\$ 1,063,981</b>	<b>\$ 892,313</b>	<b>\$ 1,085,102</b>	<b>-16.1%</b>	<b>-22.1%</b>
<b>NON-PERSONNEL</b>								
Program**	\$ 595,845	\$ 563,448	\$ 596,013	\$ 418,130	\$ 301,677	\$ 495,023	-27.9%	-49.4%
Development	\$ 73,895	\$ 68,861	\$ 85,764	\$ 58,230	\$ 34,751	\$ 64,300	-40.3%	-53.0%
General/Administrative	\$ 211,606	\$ 194,707	\$ 127,388	\$ 106,790	\$ 80,224	\$ 144,143	-24.9%	-62.1%
<b>Total Non-Personnel Expenses</b>	<b>\$ 881,346</b>	<b>\$ 827,016</b>	<b>\$ 809,166</b>	<b>\$ 583,151</b>	<b>\$ 416,652</b>	<b>\$ 703,466</b>	<b>-28.6%</b>	<b>-52.7%</b>
<b>EXPENSES SUMMARY</b>								
<b>Total Operating Expenses</b>	<b>\$ 2,026,745</b>	<b>\$ 1,976,846</b>	<b>\$ 1,983,153</b>	<b>\$ 1,647,132</b>	<b>\$ 1,308,965</b>	<b>\$ 1,788,568</b>	<b>-20.5%</b>	<b>-35.4%</b>

# Budget 3

BETWEEN \$1,000,000 AND \$3,000,000

Fiscal Year	2017	2018	2019	2020	2021	5-yr average	1-yr change	5-yr change
<b>BALANCE SHEET</b>								
<b>NET ASSETS</b>								
Unrestricted	\$ 838,693	\$ 777,699	\$ 982,151	\$ 1,026,707	\$ 1,467,798	\$ 1,018,609	+43.0%	+75.0%
Restricted	\$ 1,027,495	\$ 1,056,366	\$ 860,770	\$ 800,801	\$ 1,075,457	\$ 964,178	+34.3%	+4.7%
<b>Total Net Assets</b>	<b>\$ 1,866,188</b>	<b>\$ 1,834,064</b>	<b>\$ 1,842,921</b>	<b>\$ 1,827,508</b>	<b>\$ 2,543,256</b>	<b>\$ 1,982,787</b>	<b>+39.2%</b>	<b>+36.3%</b>
as % of Expenses	92.1%	92.8%	92.9%	111.0%	194.3%	116.6%	--	--
<b>Working Capital</b>	<b>\$ 850,214</b>	<b>\$ 1,078,752</b>	<b>\$ 1,026,727</b>	<b>\$ 789,823</b>	<b>\$ 1,196,580</b>	<b>\$ 988,419</b>	<b>+51.5%</b>	<b>+40.7%</b>
as % of Expenses	41.9%	54.6%	51.8%	48.0%	91.4%	57.5%	--	--
<b>Investments</b>	<b>\$ 800,850</b>	<b>\$ 858,779</b>	<b>\$ 961,275</b>	<b>\$ 1,006,323</b>	<b>\$ 1,232,203</b>	<b>\$ 971,886</b>	<b>+22.4%</b>	<b>+53.9%</b>
as % of Expenses	39.5%	43.4%	48.5%	61.1%	94.1%	57.3%	--	--
<b>Net Fixed Assets</b>	<b>\$ 909,016</b>	<b>\$ 871,635</b>	<b>\$ 825,397</b>	<b>\$ 792,609</b>	<b>\$ 815,010</b>	<b>\$ 842,733</b>	<b>+2.8%</b>	<b>-10.3%</b>
<b>ENDOWMENTS AND RESERVE FUNDS</b>								
<b>Balance</b>	<b>\$ 831,420</b>	<b>\$ 926,418</b>	<b>\$ 1,136,080</b>	<b>\$ 1,117,245</b>	<b>\$ 1,481,645</b>	<b>\$ 1,098,562</b>	<b>+32.6%</b>	<b>+78.2%</b>
as % of Expenses	41.0%	46.9%	57.3%	67.8%	113.2%	65.2%	--	--
<b>PERFORMANCE ACTIVITY</b>								
<b>PERFORMANCES</b>								
Main Season Productions	3.7	3.7	3.6	1.9	1.4	2.9	-28.6%	-62.7%
Main Season Performances	10	10	10	5.1	3.5	7.5	-30.8%	-64.0%
<b>ATTENDANCE</b>								
Main Season Attendance	5,454	4,659	4,702	2,150	1,292	3,651	-39.9%	-76.3%
Total Seats Available	9,446	7,614	7,813	4,063	3,048	6,397	-25.0%	-67.7%
% of Capacity Sold	57.7%	61.2%	60.2%	52.9%	42.4%	54.9%	-19.9%	-26.6%
<b>PRICING</b>								
High Ticket Price	\$ 124.42	\$ 148.06	\$ 140.06	\$ 120.88	\$ 149.88	\$ 136.66	+24.0%	+20.5%
Low Ticket Price	\$ 23.90	\$ 26.18	\$ 24.06	\$ 22.94	\$ 22.56	\$ 23.93	-1.6%	-5.6%
Average Yield per Ticket Sold*	\$ 56.58	\$ 66.05	\$ 59.95	\$ 65.49	\$ 47.32	\$ 59.08	-27.7%	-16.4%

**CONSTANT SAMPLE GROUP BASED ON DATA REPORTED FROM:**

Beth Morrison Projects | Chautauqua Opera | Chicago Opera Theater | Florentine Opera Company | Fort Worth Opera  
 HERE Arts Center | Kentucky Opera | Long Beach Opera | Madison Opera | Nashville Opera | North Carolina Opera  
 Opera Columbus | Opera Lafayette | Opera Memphis | Opera Orlando | Opera Parallèle | OPERA San Antonio  
 Opera Saratoga | Pensacola Opera | Tulsa Opera | Wolf Trap Opera

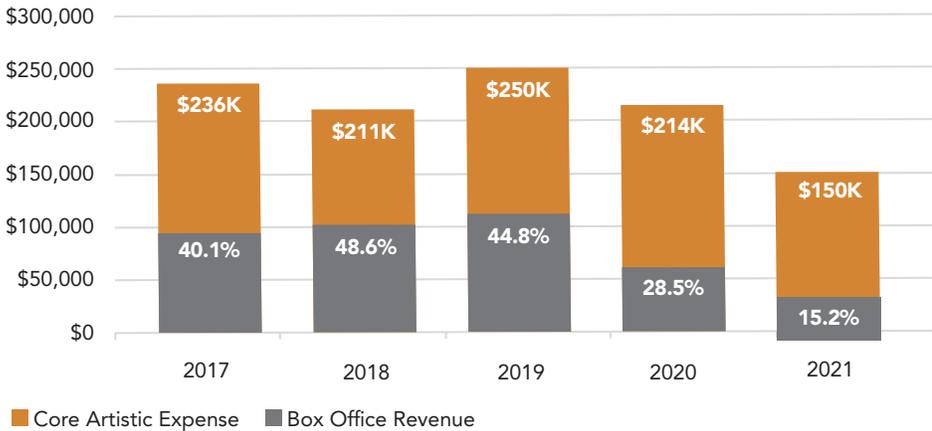
\*For FY2020 and FY2021, yield per ticket sold excludes box office revenue from alternate programming, which accounted for a disproportionate amount of box office revenue compared to in pre-pandemic seasons.

# Budget 4

BETWEEN \$250,000 AND \$1,000,000

## Average Program Coverage

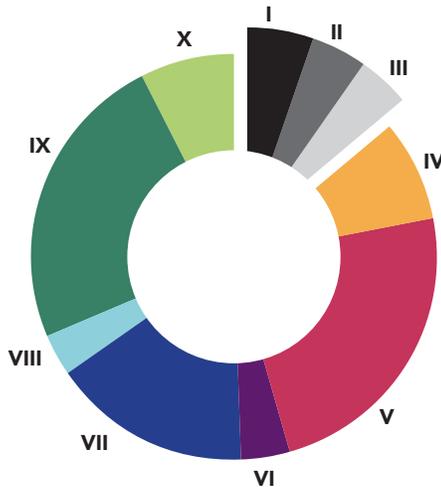
Program coverage is the amount of core artistic expenses covered by box office



## Average Activity

\$450,097
<b>OPERATING REVENUE</b>
\$414,080
<b>OPERATING EXPENSES</b>
297
<b>TICKETS SOLD</b>
649
<b>SEATS AVAILABLE</b>
45.7%
<b>CAPACITY SOLD</b>
1.1
<b>PRODUCTIONS</b>
2.3
<b>PERFORMANCES</b>

## Revenue Breakdown



### EARNED (14.1%)

I	Box Office: \$22,853 (5.4%)
II	Investment: \$18,987 (4.5%)
III	Other Earned: \$17,980 (4.2%)

### CONTRIBUTED (85.9%)

IV	Board: \$33,690 (7.9%)
V	Individuals: \$100,957 (23.7%)
VI	Corporate: \$16,193 (3.8%)
VII	Foundation: \$68,651 (16.1%)
VIII	In Kind: \$13,460 (3.2%)
IX	Government*: \$102,073 (23.9%)
X	Other Contrib.: \$31,594 (7.4%)

## Expense Breakdown

### PROGRAM\*\* (61.0%)

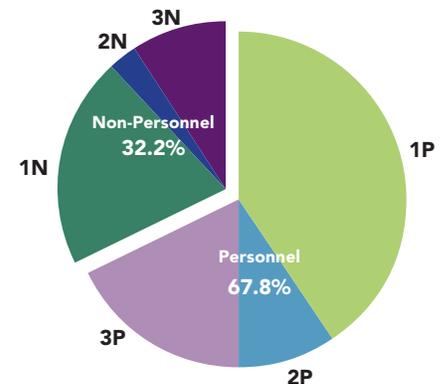
1P. Personnel: \$168,618 (40.7%)
1N. Non-Personnel: \$83,966 (20.3%)

### DEVELOPMENT (12.5%)

2P. Personnel: \$39,346 (9.5%)
2N. Non-Personnel: \$12,320 (3.0%)

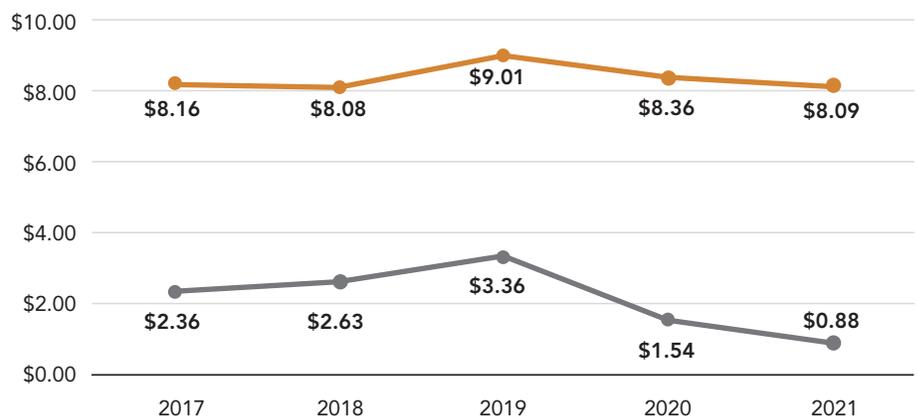
### GENERAL/ADMINISTRATIVE (26.5%)

3P. Personnel: \$72,872 (17.6%)
3N. Non-Personnel: \$36,959 (8.9%)



## Average Development & Marketing Productivity

● Development Productivity: Dollars raised from contributions per dollar spent on fundraising.  
● Marketing Productivity: Dollars earned from box office revenue per dollar spent on marketing.



\* Some companies recorded COVID-19 government relief funds as support in FY2020 and FY2021 upon notification of loan forgiveness. Remaining government relief funds will be reflected in the FY2022 Annual Field Report.

\*\* For the purposes of this report, marketing expenses are included in program expenses.

# Budget 4

Fiscal Year	2017	2018	2019	2020	2021	5-yr average	1-yr change	5-yr change
<b>FINANCIAL OVERVIEW</b>								
Operating Revenue	\$ 585,384	\$ 574,199	\$ 590,150	\$ 513,882	\$ 450,097	\$ 542,742	-12.4%	-23.1%
Operating Expenses	\$ 570,625	\$ 581,955	\$ 600,286	\$ 490,477	\$ 414,080	\$ 531,485	-15.6%	-27.4%
<b>Net Operating Income</b>	<b>\$ 14,759</b>	<b>\$ -7,756</b>	<b>\$ -10,136</b>	<b>\$ 23,405</b>	<b>\$ 36,017</b>	<b>\$ 11,258</b>	<b>+53.9%</b>	<b>+144.0%</b>
as % of Expenses	2.6%	-1.3%	-1.7%	4.8%	8.7%	2.6%	--	--
<b>OPERATING REVENUE</b>								
<b>UNRESTRICTED EARNED REVENUE</b>								
Box Office	\$ 94,721	\$ 102,496	\$ 112,084	\$ 61,089	\$ 22,853	\$ 78,649	-62.6%	-75.9%
Investments	\$ 2,444	\$ 1,523	\$ 5,171	\$ 3,017	\$ 18,987	\$ 6,228	+529.4%	+676.9%
Other Earned Revenue	\$ 57,897	\$ 50,298	\$ 54,520	\$ 32,673	\$ 17,980	\$ 42,673	-45.0%	-68.9%
<b>Total Earned Revenue</b>	<b>\$ 155,062</b>	<b>\$ 154,317</b>	<b>\$ 171,774</b>	<b>\$ 96,779</b>	<b>\$ 59,820</b>	<b>\$ 127,550</b>	<b>-38.2%</b>	<b>-61.4%</b>
<b>UNRESTRICTED CONTRIBUTED REVENUE</b>								
Board	\$ 51,010	\$ 47,043	\$ 45,111	\$ 46,069	\$ 33,690	\$ 44,585	-26.9%	-34.0%
Individual	\$ 162,810	\$ 128,498	\$ 169,901	\$ 134,434	\$ 100,957	\$ 139,320	-24.9%	-38.0%
Corporate	\$ 19,753	\$ 26,574	\$ 22,282	\$ 18,185	\$ 16,193	\$ 20,597	-11.0%	-18.0%
Foundation	\$ 95,035	\$ 97,155	\$ 78,779	\$ 82,643	\$ 68,651	\$ 84,453	-16.9%	-27.8%
In Kind	\$ 39,243	\$ 18,516	\$ 21,390	\$ 23,283	\$ 13,460	\$ 23,178	-42.2%	-65.7%
Other Private Support	\$ 14,760	\$ 26,159	\$ 17,566	\$ 35,290	\$ 31,594	\$ 25,074	-10.5%	+114.0%
<b>Total Private Support</b>	<b>\$ 382,612</b>	<b>\$ 343,944</b>	<b>\$ 355,027</b>	<b>\$ 339,904</b>	<b>\$ 264,545</b>	<b>\$ 337,206</b>	<b>-22.2%</b>	<b>-30.9%</b>
<b>Total Government Support*</b>	<b>\$ 27,579</b>	<b>\$ 34,807</b>	<b>\$ 28,046</b>	<b>\$ 39,873</b>	<b>\$ 102,073</b>	<b>\$ 46,475</b>	<b>+156.0%</b>	<b>+270.1%</b>
<b>Total Contributed Revenue</b>	<b>\$ 410,190</b>	<b>\$ 378,751</b>	<b>\$ 383,073</b>	<b>\$ 379,776</b>	<b>\$ 366,618</b>	<b>\$ 383,682</b>	<b>-3.5%</b>	<b>-10.6%</b>
<b>REVENUE SUMMARY</b>								
Net Assets Released from Restriction	\$ 20,133	\$ 41,132	\$ 35,303	\$ 37,326	\$ 23,659	\$ 31,510	-36.6%	+17.5%
<b>Total Operating Revenue</b>	<b>\$ 585,384</b>	<b>\$ 574,199</b>	<b>\$ 590,150</b>	<b>\$ 513,882</b>	<b>\$ 450,097</b>	<b>\$ 542,742</b>	<b>-12.4%</b>	<b>-23.1%</b>
<b>OPERATING EXPENSES</b>								
<b>PERSONNEL</b>								
Program**	\$ 206,091	\$ 244,589	\$ 264,914	\$ 206,944	\$ 168,618	\$ 218,231	-18.5%	-18.2%
Development	\$ 32,073	\$ 30,671	\$ 34,243	\$ 36,275	\$ 39,346	\$ 34,522	+8.5%	+22.7%
General/Administrative	\$ 63,995	\$ 72,179	\$ 75,305	\$ 82,586	\$ 72,872	\$ 73,387	-11.8%	+13.9%
<b>Total Personnel Expenses</b>	<b>\$ 302,158</b>	<b>\$ 347,438</b>	<b>\$ 374,463</b>	<b>\$ 325,804</b>	<b>\$ 280,836</b>	<b>\$ 326,140</b>	<b>-13.8%</b>	<b>-7.1%</b>
<b>NON-PERSONNEL</b>								
Program**	\$ 196,799	\$ 160,831	\$ 154,799	\$ 105,954	\$ 83,966	\$ 140,470	-20.8%	-57.3%
Development	\$ 21,744	\$ 21,846	\$ 18,632	\$ 13,256	\$ 12,320	\$ 17,560	-7.1%	-43.3%
General/Administrative	\$ 49,924	\$ 51,840	\$ 52,392	\$ 45,463	\$ 36,959	\$ 47,315	-18.7%	-26.0%
<b>Total Non-Personnel Expenses</b>	<b>\$ 268,467</b>	<b>\$ 234,517</b>	<b>\$ 225,823</b>	<b>\$ 164,672</b>	<b>\$ 133,244</b>	<b>\$ 205,345</b>	<b>-19.1%</b>	<b>-50.4%</b>
<b>EXPENSES SUMMARY</b>								
<b>Total Operating Expenses</b>	<b>\$ 570,625</b>	<b>\$ 581,955</b>	<b>\$ 600,286</b>	<b>\$ 490,477</b>	<b>\$ 414,080</b>	<b>\$ 531,485</b>	<b>-15.6%</b>	<b>-27.4%</b>

\* Some companies recorded COVID-19 government relief funds as support in FY2020 and FY2021 upon notification of loan forgiveness. Remaining government relief funds will be reflected in the FY2022 Annual Field Report.

\*\* For the purposes of this report, marketing expenses are included in program expenses.

## BETWEEN \$250,000 AND \$1,000,000

Fiscal Year	2017	2018	2019	2020	2021	5-yr average	1-yr change	5-yr change
<b>BALANCE SHEET</b>								
<b>NET ASSETS</b>								
Unrestricted	\$ 206,524	\$ 201,282	\$ 229,737	\$ 241,382	\$ 294,228	\$ 234,630	+21.9%	+42.5%
Restricted	\$ 190,952	\$ 207,013	\$ 211,440	\$ 178,780	\$ 144,507	\$ 186,538	-19.2%	-24.3%
<b>Total Net Assets</b>	<b>\$ 397,475</b>	<b>\$ 408,294</b>	<b>\$ 441,176</b>	<b>\$ 420,162</b>	<b>\$ 438,735</b>	<b>\$ 421,169</b>	<b>+4.4%</b>	<b>+10.4%</b>
as % of Expenses	69.7%	70.2%	73.5%	85.7%	106.0%	81.0%	--	--
<b>Working Capital</b>	<b>\$ 126,305</b>	<b>\$ 158,010</b>	<b>\$ 160,219</b>	<b>\$ 173,524</b>	<b>\$ 305,875</b>	<b>\$ 184,787</b>	<b>+76.3%</b>	<b>+142.2%</b>
as % of Expenses	22.1%	27.2%	26.7%	35.4%	73.9%	37.0%	--	--
<b>Investments</b>	<b>\$ 105,236</b>	<b>\$ 97,005</b>	<b>\$ 126,561</b>	<b>\$ 123,091</b>	<b>\$ 163,152</b>	<b>\$ 123,009</b>	<b>+32.5%</b>	<b>+55.0%</b>
as % of Expenses	18.4%	16.7%	21.1%	25.1%	39.4%	24.1%	--	--
<b>Net Fixed Assets</b>	<b>\$ 228,601</b>	<b>\$ 220,789</b>	<b>\$ 209,107</b>	<b>\$ 197,990</b>	<b>\$ 59,178</b>	<b>\$ 183,133</b>	<b>-70.1%</b>	<b>-74.1%</b>
<b>ENDOWMENTS AND RESERVE FUNDS</b>								
<b>Balance</b>	<b>\$ 67,462</b>	<b>\$ 63,897</b>	<b>\$ 95,286</b>	<b>\$ 117,814</b>	<b>\$ 143,953</b>	<b>\$ 97,682</b>	<b>+22.2%</b>	<b>+113.4%</b>
as % of Expenses	11.8%	11.0%	15.9%	24.0%	34.8%	19.5%	--	--
<b>PERFORMANCE ACTIVITY</b>								
<b>PERFORMANCES</b>								
Main Season Productions	3.0	3.1	3.2	1.5	1.1	2.4	-25.8%	-63.5%
Main Season Performances	10	9.0	9.2	3.3	2.3	6.7	-30.4%	-77.0%
<b>ATTENDANCE</b>								
Main Season Attendance	3,116	2,703	2,690	989	297	1,959	-70.0%	-90.5%
Total Seats Available	4,469	4,393	4,257	1,612	658	3,078	-59.2%	-85.3%
% of Capacity Sold	69.7%	61.5%	63.2%	61.3%	45.7%	60.3%	-25.4%	-34.4%
<b>PRICING</b>								
High Ticket Price	\$ 74.18	\$ 76.47	\$ 81.00	\$ 80.10	\$ 78.89	\$ 78.13	-1.5%	+6.4%
Low Ticket Price	\$ 16.59	\$ 21.10	\$ 19.48	\$ 19.29	\$ 12.42	\$ 17.77	-35.6%	-25.1%
Average Yield per Ticket Sold*	\$ 30.40	\$ 37.92	\$ 41.67	\$ 49.09	\$ 53.19	\$ 42.45	+8.4%	+75.0%

### CONSTANT SAMPLE GROUP BASED ON DATA REPORTED FROM:

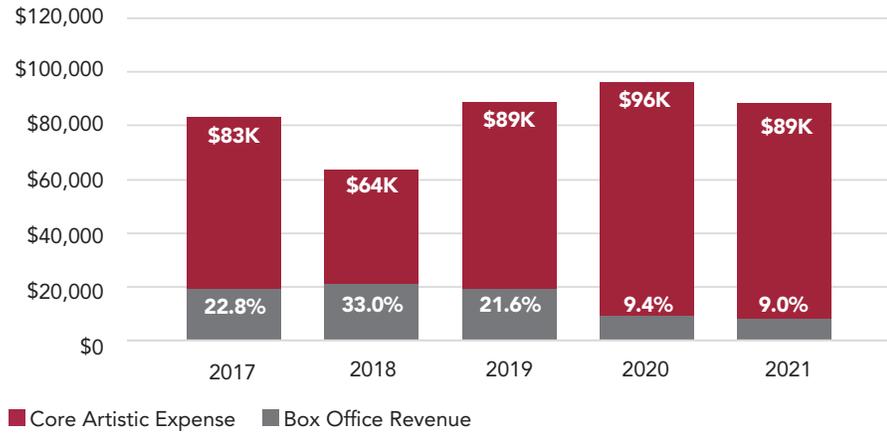
The American Opera Project | Anchorage Opera | Ars Lyrica Houston | Cedar Rapids Opera Theatre | Dayton Opera  
 El Paso Opera | Eugene Opera | Fargo-Moorhead Opera | IN Series | The Industry | Intermountain Opera Bozeman  
 On Site Opera | Opera Baltimore | Opera Birmingham | Opera Maine | Opera Modesto | Opera on the James  
 Opera Roanoke | Opera Southwest | Opera Steamboat | Pacific Opera Project | Pittsburgh Festival Opera | Pocket Opera  
 Tri-Cities Opera | Union Avenue Opera | UrbanArias

\* For FY2020 and FY2021, yield per ticket sold excludes box office revenue from alternate programming, which accounted for a disproportionate amount of box office revenue compared to in pre-pandemic seasons.

# Budget 5

## Average Program Coverage

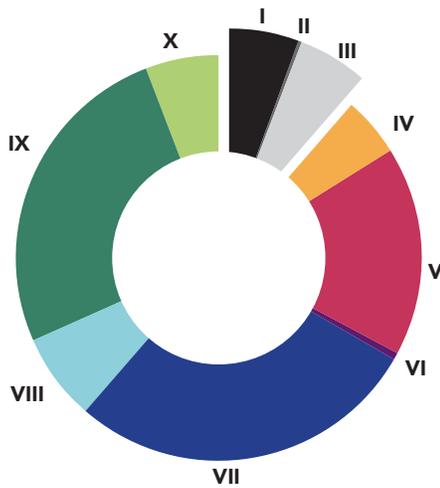
Program coverage is the amount of core artistic expenses covered by box office



## Average Activity

<b>\$144,234</b>
<b>OPERATING REVENUE</b>
<b>\$145,922</b>
<b>OPERATING EXPENSES</b>
<b>67</b>
<b>TICKETS SOLD</b>
<b>88</b>
<b>SEATS AVAILABLE</b>
<b>76.1%</b>
<b>CAPACITY SOLD</b>
<b>0.4</b>
<b>PRODUCTIONS</b>
<b>1.0</b>
<b>PERFORMANCES</b>

## Revenue Breakdown



### EARNED (11.6%)

- I Box Office: \$7,974 (5.7%)
- II Investment: \$371 (0.3%)
- III Other Earned: \$7,906 (5.6%)

### CONTRIBUTED (88.4%)

- IV Board: \$6,596 (4.7%)
- V Individuals: \$23,218 (16.6%)
- VI Corporate: \$995 (0.7%)
- VII Foundation: \$38,954 (27.8%)
- VIII In Kind: \$10,129 (7.2%)
- IX Government: \$36,038 (25.7%)
- X Other Contrib.: \$7,985 (5.7%)

## Expense Breakdown

### PROGRAM\*\* (63.6%)

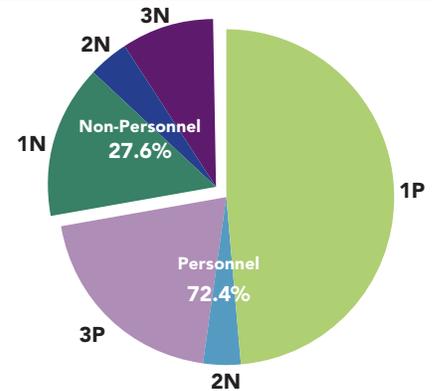
- 1P. Personnel: \$71,054 (48.7%)
- 1N. Non-Personnel: \$21,696 (14.9%)

### DEVELOPMENT (7.4%)

- 2P. Personnel: \$5,276 (3.6%)
- 2N. Non-Personnel: \$5,502 (3.8%)

### GENERAL/ADMINISTRATIVE (29.1%)

- 3P. Personnel: \$29,269 (20.1%)
- 3N. Non-Personnel: \$13,125 (9.0%)



## Average Development & Marketing Productivity

- Development Productivity: Dollars raised from contributions per dollar spent on fundraising.
- Marketing Productivity: Dollars earned from box office revenue per dollar spent on marketing.



\* Some companies recorded COVID-19 government relief funds as support in FY2020 and FY2021 upon notification of loan forgiveness. Remaining government relief funds will be reflected in the FY2022 Annual Field Report.

\*\* For the purposes of this report, marketing expenses are included in program expenses.

# UNDER \$250,000

Fiscal Year	2017	2018	2019	2020	2021	5-yr average	1-yr change	5-yr change
<b>FINANCIAL OVERVIEW</b>								
Operating Revenue	\$ 143,354	\$ 138,800	\$ 150,736	\$ 121,073	\$ 144,234	\$ 139,639	+19.1%	+0.6%
Operating Expenses	\$ 159,199	\$ 155,579	\$ 179,906	\$ 139,620	\$ 145,922	\$ 156,046	+4.5%	-8.3%
<b>Net Operating Income</b>	<b>\$ -15,846</b>	<b>\$ -16,780</b>	<b>\$ -29,170</b>	<b>\$ -18,548</b>	<b>\$ -1,688</b>	<b>\$ -16,406</b>	<b>+90.9%</b>	<b>+89.3%</b>
as % of Expenses	-10.0%	-10.8%	-16.2%	-13.3%	-1.2%	-10.3%	--	--
<b>OPERATING REVENUE</b>								
<b>UNRESTRICTED EARNED REVENUE</b>								
Box Office	\$ 19,005	\$ 21,061	\$ 19,204	\$ 9,059	\$ 7,974	\$ 15,261	-12.0%	-58.0%
Investments	\$ 165	\$ 20	\$ 1,300	\$ 767	\$ 371	\$ 524	-51.7%	+124.6%
Other Earned Revenue	\$ 22,694	\$ 23,250	\$ 24,907	\$ 14,738	\$ 7,906	\$ 18,699	-46.4%	-65.2%
<b>Total Earned Revenue</b>	<b>\$ 41,864</b>	<b>\$ 44,332</b>	<b>\$ 45,410</b>	<b>\$ 24,564</b>	<b>\$ 16,251</b>	<b>\$ 34,484</b>	<b>-33.8%</b>	<b>-61.2%</b>
<b>UNRESTRICTED CONTRIBUTED REVENUE</b>								
Board	\$ 5,244	\$ 8,691	\$ 6,440	\$ 4,954	\$ 6,596	\$ 6,385	+33.2%	+25.8%
Individual	\$ 23,666	\$ 23,170	\$ 36,712	\$ 22,575	\$ 23,218	\$ 25,868	+2.8%	-1.9%
Corporate	\$ 2,461	\$ 4,382	\$ 9,748	\$ 2,342	\$ 995	\$ 3,986	-57.5%	-59.6%
Foundation	\$ 35,513	\$ 24,808	\$ 20,470	\$ 35,958	\$ 38,954	\$ 31,140	+8.3%	+9.7%
In Kind	\$ 15,431	\$ 14,047	\$ 16,919	\$ 11,131	\$ 10,129	\$ 13,532	-9.0%	-34.4%
Other Private Support	\$ 7,925	\$ 4,014	\$ 4,405	\$ 7,861	\$ 7,985	\$ 6,438	+1.6%	+0.8%
<b>Total Private Support</b>	<b>\$ 90,239</b>	<b>\$ 79,112</b>	<b>\$ 94,694</b>	<b>\$ 84,821</b>	<b>\$ 87,877</b>	<b>\$ 87,349</b>	<b>+3.6%</b>	<b>-2.6%</b>
<b>Total Government Support*</b>	<b>\$ 11,251</b>	<b>\$ 11,850</b>	<b>\$ 10,632</b>	<b>\$ 11,688</b>	<b>\$ 36,038</b>	<b>\$ 16,292</b>	<b>+208.3%</b>	<b>+220.3%</b>
<b>Total Contributed Revenue</b>	<b>\$ 101,490</b>	<b>\$ 90,962</b>	<b>\$ 105,326</b>	<b>\$ 96,509</b>	<b>\$ 123,915</b>	<b>\$ 103,640</b>	<b>+28.4%</b>	<b>+22.1%</b>
<b>REVENUE SUMMARY</b>								
Net Assets Released from Restriction	\$ 0	\$ 3,507	\$ 0	\$ 0	\$ 4,067	\$ 1,515	--	--
<b>Total Operating Revenue</b>	<b>\$ 143,354</b>	<b>\$ 138,800</b>	<b>\$ 150,736</b>	<b>\$ 121,073</b>	<b>\$ 144,234</b>	<b>\$ 139,639</b>	<b>+19.1%</b>	<b>+0.6%</b>
<b>OPERATING EXPENSES</b>								
<b>PERSONNEL</b>								
Program**	\$ 77,226	\$ 82,197	\$ 83,863	\$ 56,380	\$ 71,054	\$ 74,144	+26.0%	-8.0%
Development	\$ 4,160	\$ 6,189	\$ 2,743	\$ 1,918	\$ 5,276	\$ 4,057	+175.0%	+26.8%
General/Administrative	\$ 12,762	\$ 16,667	\$ 25,881	\$ 27,281	\$ 29,269	\$ 22,372	+7.3%	+129.4%
<b>Total Personnel Expenses</b>	<b>\$ 94,148</b>	<b>\$ 105,053</b>	<b>\$ 112,487</b>	<b>\$ 85,579</b>	<b>\$ 105,598</b>	<b>\$ 100,573</b>	<b>+23.4%</b>	<b>+12.2%</b>
<b>NON-PERSONNEL</b>								
Program**	\$ 41,151	\$ 34,034	\$ 44,418	\$ 33,012	\$ 21,696	\$ 34,862	-34.3%	-47.3%
Development	\$ 7,405	\$ 2,979	\$ 4,216	\$ 7,031	\$ 5,502	\$ 5,427	-21.7%	-25.7%
General/Administrative	\$ 16,496	\$ 13,514	\$ 18,785	\$ 13,999	\$ 13,125	\$ 15,184	-6.2%	-20.4%
<b>Total Non-Personnel Expenses</b>	<b>\$ 65,052</b>	<b>\$ 50,527</b>	<b>\$ 67,420</b>	<b>\$ 54,042</b>	<b>\$ 40,324</b>	<b>\$ 55,473</b>	<b>-25.4%</b>	<b>-38.0%</b>
<b>EXPENSES SUMMARY</b>								
<b>Total Operating Expenses</b>	<b>\$ 159,199</b>	<b>\$ 155,579</b>	<b>\$ 179,906</b>	<b>\$ 139,620</b>	<b>\$ 145,922</b>	<b>\$ 156,046</b>	<b>+4.5%</b>	<b>-8.3%</b>

# Budget 5

UNDER \$250,000

Fiscal Year	2017	2018	2019	2020	2021	5-yr average	1-yr change	5-yr change
<b>BALANCE SHEET</b>								
<b>NET ASSETS</b>								
Unrestricted	\$ 35,108	\$ 30,420	\$ 38,705	\$ 39,680	\$ 59,180	\$ 40,619	+49.1%	+68.6%
Restricted	\$ 26,643	\$ 30,025	\$ 12,033	\$ 1,113	\$ 24,073	\$ 18,778	+2062.2%	-9.6%
<b>Total Net Assets</b>	<b>\$ 61,751</b>	<b>\$ 60,445</b>	<b>\$ 50,738</b>	<b>\$ 40,793</b>	<b>\$ 83,252</b>	<b>\$ 59,396</b>	<b>+104.1%</b>	<b>+34.8%</b>
as % of Expenses	38.8%	38.9%	28.2%	29.2%	57.1%	38.4%	--	--
<b>Working Capital</b>	<b>\$ 58,372</b>	<b>\$ 58,533</b>	<b>\$ 30,309</b>	<b>\$ 27,213</b>	<b>\$ 100,866</b>	<b>\$ 55,059</b>	<b>+270.7%</b>	<b>+72.8%</b>
as % of Expenses	36.7%	37.6%	16.8%	19.5%	69.1%	36.0%	--	--
<b>Investments</b>	<b>\$ 11,933</b>	<b>\$ 13,052</b>	<b>\$ 18,315</b>	<b>\$ 19,015</b>	<b>\$ 43,696</b>	<b>\$ 21,202</b>	<b>+129.8%</b>	<b>+266.2%</b>
as % of Expenses	7.5%	8.4%	10.2%	13.6%	29.9%	13.9%	--	--
<b>Net Fixed Assets</b>	<b>\$ 1,386</b>	<b>\$ 1,246</b>	<b>\$ 1,447</b>	<b>\$ 1,365</b>	<b>\$ 1,639</b>	<b>\$ 1,417</b>	<b>+20.1%</b>	<b>+18.2%</b>
<b>ENDOWMENTS AND RESERVE FUNDS</b>								
<b>Balance</b>	<b>\$ 11,933</b>	<b>\$ 13,052</b>	<b>\$ 17,140</b>	<b>\$ 21,106</b>	<b>\$ 23,849</b>	<b>\$ 17,416</b>	<b>+13.0%</b>	<b>+99.9%</b>
as % of Expenses	7.5%	8.4%	9.5%	15.1%	16.3%	11.4%	--	--
<b>PERFORMANCE ACTIVITY</b>								
<b>PERFORMANCES</b>								
Main Season Productions	1.6	2.6	2.6	1.2	0.4	1.7	-66.7%	-75.0%
Main Season Performances	4.0	5.0	8.6	5.2	1.0	4.8	-80.8%	-75.0%
<b>ATTENDANCE</b>								
Main Season Attendance	547	463	787	544	67	481	-87.7%	-87.8%
Total Seats Available	712	709	1,074	812	88	679	-89.2%	-87.6%
% of Capacity Sold	76.9%	65.3%	73.2%	67.0%	76.1%	71.7%	+13.6%	-0.9%
<b>PRICING</b>								
High Ticket Price	\$ 45.00	\$ 50.00	\$ 46.84	\$ 49.40	\$ 58.00	\$ 49.85	+17.4%	+28.9%
Low Ticket Price	\$ 13.67	\$ 17.00	\$ 17.50	\$ 15.70	\$ 25.00	\$ 17.77	+59.2%	+82.9%
Average Yield per Ticket Sold*	\$ 34.74	\$ 45.52	\$ 24.41	\$ 16.64	\$ 40.12	\$ 32.29	+141.0%	+15.5%

**CONSTANT SAMPLE GROUP BASED ON DATA REPORTED FROM:**

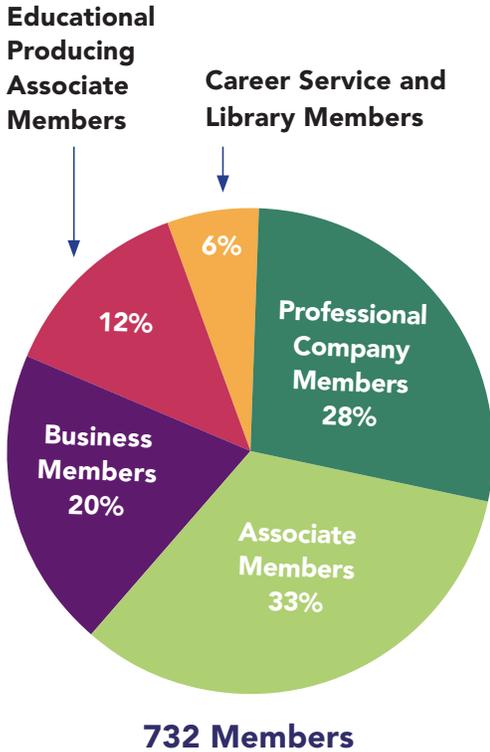
American Lyric Theater | Chelsea Opera | The Cleveland Opera | Encompass New Opera Theatre | Experiments in Opera  
 New Camerata Opera | New Philharmonic Opera | Opera for the Young | Opera MODO | Opera on Tap  
 Orchestra of New Spain | Sacramento Philharmonic & Opera | Solo Opera | Victory Hall Opera

\*For FY2020 and FY2021, yield per ticket sold excludes box office revenue from alternate programming, which accounted for a disproportionate amount of box office revenue compared to in pre-pandemic seasons.

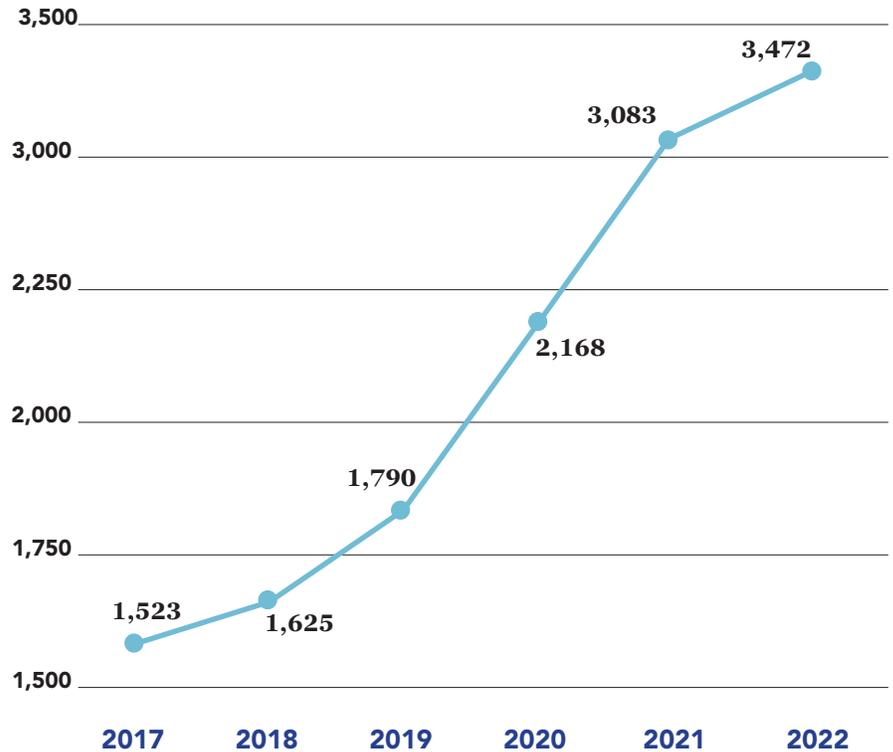
# OPERA America: By the Numbers

## MEMBERSHIP

### Organizations



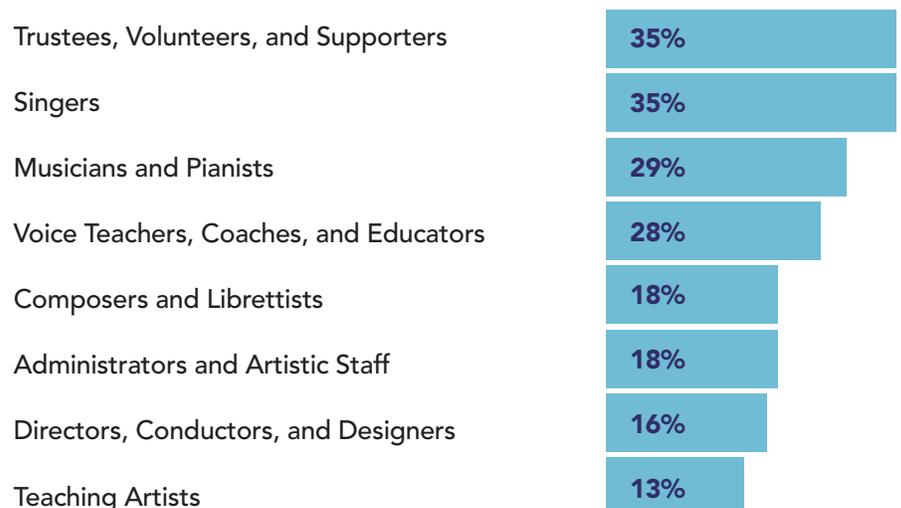
### Individual Member Growth



### New Professional Company Members in 2022

- Ars Lyrica Houston
- Barn Opera
- First Coast Opera
- New Music Theatre Project
- Overtone Industries
- Wilmington Concert Opera

### Individual Members by Profession



## MEMBER SERVICES

**\$570K**  
Grants to members

**36**  
Webinars & online events

**889**  
Opera Conference attendees

**1.3K**  
Conference video views

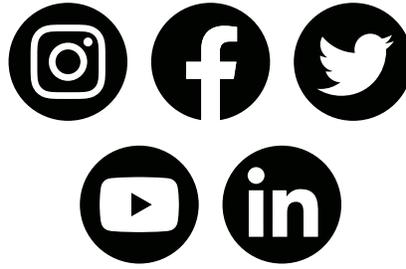
**70K**  
National Opera Center visitors

**26**  
Custom research reports for members

**4.7K**  
Opera America Magazine readers

## SOCIAL MEDIA

### OA Channels



**859K**  
Reach

**1.34M**  
Impressions

**62K**  
Followers

### Facebook Affinity Groups

**3.9K**  
Women's Opera Network Members

**480**  
Racial Justice Opera Network Members

### Top Post of 2022



**711**  
Likes

**2.9K**  
Engagement

**15.3K**  
Reach

## WEBSITE

**560K**  
Page Views

**139K**  
Unique Visitors

### Oral History Project

**51**  
Oral Histories Published

**2.8K**  
Views

# OPERA America Financial Report

Fiscal year 2022 extended the challenges and uncertainty of FY2021, making it three consecutive years that have no basis for comparison to the past.

In this regard, OPERA America joined artists and producers across the country in working to maintain fiscal health while finding new ways to support creativity and service without interruption.

Exceptionally generous donors, once again, made it possible to waive all dues for organizational members as well as individual artists. Thus, OPERA America's membership revenue remained relatively consistent with past years while easing the financial burden on key constituencies. Contributed revenue from both individuals and institutions also remained relatively consistent with last year, thanks to the loyalty and generosity of OPERA America's donor family.

The greatest variance from prior years in terms of earned income continues to be in relation to the National Opera Center. Studios and larger audition/recital spaces were full to overflowing in the fall of 2021, but the onset of Omicron early in 2022 resulted in significantly reduced activity. Still, FY2022 revenue was stronger than in FY2021, booking \$755,000 compared to only \$76,000 in FY2021. (For reference, income from Opera Center rentals reached \$1.2 million in FY2019, the last full year before the pandemic.)

Disappointing, too, was the postponement of the OPERA America Salutes dinner — originally planned for FY2020 in conjunction with OPERA America's 50<sup>th</sup> anniversary to launch the Opera Hall of Fame and honor the recipients of the National "Opéra Trustee Recognition Awards.

Despite these variations from the board-approved budget, OPERA America was able to close FY2021 with a surplus of \$9,006, following a transfer to the board-designated reserve that was made possible by the revenue received from the Payroll Protection Loan program and Employee Retention Tax Credits, federal programs that helped sustain small businesses through the pandemic. This reserve remains available to buffer OPERA America against challenges that continue into FY2023.

Net assets decreased by slightly more than \$3 million between FY2021 and FY2022 due to the completion of an important multi-year foundation grant and the market-related decline in OPERA America's Opera Fund Endowment and National Opera Center Endowment. The combined endowments decreased in total value from \$11.2 million to \$10.9 million

as of June 30 after approved draws and gift reclassification. Unrestricted operating reserves rose to \$1.75 million from \$1.49 million, bolstered once again by federal relief programs.

With volatile markets, rising interest rates, and the possibility of a recession, FY2023 will continue to be characterized by challenges. Thanks to members, donors, and the federal programs that provided essential supplement support for the entire arts industry, OPERA America is in a position to sustain its portfolio of services to the entire field.

## Statement of Financial Position

### As of June 30, 2022

Total Assets	\$	19,961,792
Total Liabilities	\$	4,475,581
<b>TOTAL NET ASSETS</b>	<b>\$</b>	<b>15,486,211</b>
Core Operating	\$	99,641
National Opera Center Fund	\$	163,324
Board-Designated Funds	\$	1,591,527
Funds with Restriction - Purpose	\$	2,670,421
Funds with Restriction - Perpetual	\$	10,961,298

## Statement of Activities

### As of June 30, 2022

Total Earned	\$	1,486,447	42%
Total Contributed	\$	2,042,288	58%
<b>TOTAL REVENUE</b>	<b>\$</b>	<b>3,528,735</b>	<b>100%</b>
Program Services	\$	5,290,400	81%
General and Administrative	\$	721,499	11%
Development	\$	523,761	8%
<b>TOTAL EXPENSES</b>	<b>\$</b>	<b>6,535,660</b>	<b>100%</b>
<b>CHANGE IN NET ASSETS</b>	<b>\$</b>	<b>(3,006,925)</b>	

# OPERA America Financial Report

## Operating Revenue, Expenses, and Surplus

### OPERATING REVENUE

Annual Fund/Individual Support	\$ 1,531,381	22%
Foundation Grants	\$ 2,095,879	30%
Corporate Contributions	\$ 198,500	3%
Government Grants	\$ 1,080,150	16%
Membership Fees and Dues	\$ 45,400	1%
Annual Conference Revenue	\$ 495,877	7%
Opera Center Rentals	\$ 755,991	11%
Other Earned Income	\$ 132,988	2%
Opera Fund/Opera Center Endowment Draws	\$ 563,500	8%
<b>SUBTOTAL</b>	<b>\$ 6,899,666</b>	<b>100%</b>

### OPERATING EXPENSES

#### Program Services

Artistic Services	\$ 773,553	12%
Annual Conference	\$ 680,603	10%
Learning, Leadership, and Professional Development	\$ 260,396	4%
Grants to Members	\$ 567,000	9%
Information Services and Publications	\$ 558,990	9%
Media Relations and Marketing	\$ 294,145	5%
Membership	\$ 353,922	5%
National Opera Center and Occupancy Costs	\$ 1,733,730	27%
Public Affairs	\$ 68,061	1%

#### Support Services

General and Administrative	\$ 721,499	11%
Development	\$ 523,761	8%
<b>SUBTOTAL</b>	<b>\$ 6,535,660</b>	<b>100%</b>

### NET OPERATING SURPLUS

	\$ 364,006	
Transfer to Board-Designated Reserve	\$ (355,000)	
<b>OPERATING SURPLUS</b>	<b>\$ 9,006</b>	

# OPERA America Annual Support

December 2021 – November 2022

OPERA America is grateful for generous annual support from individuals and institutions that provides the essential foundation for strengthening the opera field.

## LEADERSHIP CIRCLE

Bank of America  
C. Graham Berwind, III / Spring Point Partners <sup>†</sup>  
Ann and Gordon Getty Foundation  
Howard Gilman Foundation  
The Heinz Endowments  
Charles and Cerise Jacobs Charitable Foundation  
Gene Kaufman, Terry Eder-Kaufman, and New Vision for NYC Opera  
Lindemann Charitable Foundation II, Inc. <sup>†</sup>  
Marineau Family Foundation <sup>†</sup>  
Mellon Foundation  
Susan F. and William C. Morris <sup>†</sup>  
National Endowment for the Arts  
New York City Department of Cultural Affairs  
New York State Council on the Arts  
Katharine S. and Axel G. Rosin Fund of The Scherman Foundation  
Virginia B. Toulmin Foundation  
U.S. Small Business Association  
The Wallace Foundation

## PRESIDENT'S CIRCLE

Arthur F. and Alice E. Adams Charitable Foundation  
The Amphion Foundation  
Theodore H. Barth Foundation, Inc.  
Jim and Nancy Barton <sup>†</sup>  
John and Astrid Baumgardner <sup>†</sup>  
Jane Bernstein and Bob Ellis <sup>†</sup>  
Susan Bienkowski <sup>†</sup>  
Larry and Coren Bomback  
Carol Franc Buck Foundation  
California Community Foundation  
Mark Campbell  
The Aaron Copland Fund for Music  
Emilie Roy Corey  
The Joseph and Robert Cornell Memorial Foundation  
Carol E. and David A. Domina <sup>†</sup>  
Karin Eames  
Elizabeth Eveillard <sup>†</sup>  
Kenneth R. Feinberg <sup>†</sup>  
James A. Feldman and Natalie Wexler <sup>†</sup>

Fidelity Charitable  
Scott H. and Margee M. Filstrup <sup>†</sup>  
Francis Goelet Charitable Lead Trusts  
Ruth and Rick Harper <sup>†</sup>  
Carol and Warner Henry <sup>†</sup>  
Plato and Dorothy Karayanis <sup>†</sup>  
Sally Kurnick <sup>†</sup>  
Virginia and Nix Lauridsen <sup>†</sup>  
Carol Lazier <sup>†</sup>  
Ronald and Barbara Leirvik  
Jeanette Lerman-Neubauer <sup>†</sup>  
Mont and Karen Levy <sup>†</sup>  
Sylvia and Paul Lorton, Jr. <sup>†</sup>  
Madison Charitable Foundation <sup>†</sup>  
Susan Graf Marineau <sup>†</sup>  
Jacqueline Badger Mars <sup>†</sup>  
Michael J. McGinley  
The Montrone Family  
John Nesholm <sup>†</sup>  
Meredith L. Hathorn Penick  
Mr. and Mrs. E. Lee Perry <sup>†</sup>  
Elkhanah Pulitzer  
Pamela Zell Rigg <sup>†</sup>  
Jane A. and Morton J. Robinson  
The San Diego Foundation  
Schwab Charitable  
Jeri Sedlar and Rick Miners  
Howard and Sarah D. Solomon Foundation <sup>†</sup>  
Marc S. Solomon Family <sup>†</sup>  
Gene and Jean Stark  
Eva and Marc Stern  
Robert S. and Shoshana B. Tancer <sup>†</sup>  
Barbara Augusta Teichert <sup>†</sup>  
The Tobin Theatre Arts Fund  
Joanna and Peter Townsend <sup>†</sup>  
Mr. and Mrs. Stephen Trampe <sup>†</sup>  
John G. Turner and Jerry G. Fischer <sup>†</sup>  
Vanguard Charitable  
Gary L. Wasserman <sup>†</sup>  
Roma B. Wittcoff <sup>†</sup>  
Carole J. Yaley <sup>†</sup>  
Anonymous (2) <sup>†</sup>  
Anonymous (2)

## PATRON CIRCLE

Nina Abrams Fund  
John Absalom and Margaret Cusack Absalom <sup>5</sup>  
Carl Adkins and Dianne Balfour  
Alan Agle  
Maria Allen  
Carla and Fernando Alvarado <sup>†</sup>  
American Endowment Foundation  
Robin Angly <sup>†</sup>  
Betsy Shack Barbanell  
Any and Michael Barr  
Julie and Roger Baskes <sup>†</sup>  
Afton Battle and Raymond Ciborowski  
Patricia K. Beggs <sup>†</sup>  
Benevity  
Daniel Biaggi and David Espinosa  
Sandra Blake  
Gus and Mary Blanchard  
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### BUDGET 2 (\$3 million to \$15 million)

Arizona Opera The Atlanta Opera Austin Opera Boston Lyric Opera Calgary Opera <sup>c</sup> Central City Opera Cincinnati Opera	Des Moines Metro Opera Edmonton Opera <sup>c</sup> The Glimmerglass Festival Hawai'i Opera Theatre Lyric Opera of Kansas City Minnesota Opera Opera Colorado	Opéra de Montréal <sup>c</sup> Opera Omaha Opera Philadelphia Opera San José Opera Theatre of Saint Louis Pacific Opera Victoria <sup>c</sup> Palm Beach Opera	Pittsburgh Opera Portland Opera San Diego Opera Sarasota Opera Utah Symphony   Utah Opera Vancouver Opera <sup>c</sup> Virginia Opera
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### BUDGET 3 (\$1 million to \$3 million)

Beth Morrison Projects Chautauqua Opera Chicago Opera Theater Dayton Performing Arts Alliance Richard B. Fisher Center for the Performing Arts Florentine Opera Company Florida Grand Opera Fort Worth Opera HERE Arts Center	Kentucky Opera Knoxville Opera Lamplighters Music Theatre Long Beach Opera Madison Opera Manitoba Opera <sup>c</sup> Nashville Opera New Orleans Opera North Carolina Opera Odyssey Opera Opera Atelier <sup>c</sup>	Opera Carolina Opera Columbus Opéra de Québec <sup>c</sup> Opera Idaho Opera Lafayette Opera Memphis Opera Naples Opera Parallèle OPERA San Antonio Opera Santa Barbara Opera Saratoga	OperaDelaware Pensacola Opera Soundstreams Canada <sup>c</sup> Spoleto Festival USA St. Petersburg Opera Company Tapestry Opera <sup>c</sup> Teatro Nuovo Toledo Opera Tulsa Opera Wolf Trap Opera
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### BUDGET 4 (\$250,000 to \$1 million)

Against the Grain Theatre <sup>c</sup> American Lyric Theater The American Opera Project Anchorage Opera Annapolis Opera Ardea Arts - Opera Out Of Bounds Ars Lyrica Houston <sup>N</sup> Boston Baroque Bronx Opera Cedar Rapids Opera Charlottesville Opera El Paso Opera Encompass New Opera Theatre Eugene Opera Fargo-Moorhead Opera	Festival Opera Finger Lakes Opera Haymarket Opera Heartbeat Opera IN Series Indianapolis Opera The Industry Inland Northwest Opera Intermountain Opera Bozeman Livermore Valley Opera Lyric Opera of the North Maryland Opera Mobile Opera On Site Opera Opera Birmingham	Opera for the Young Opera Grand Rapids Opera in the Heights Opéra Louisiane Opera Maine Opera Mississippi Opera Modesto Opera North Opera on the Avalon <sup>c</sup> Opera on the James Opera Orlando Opera Roanoke Opera Southwest Opera Steamboat Opera Tampa Pacific Opera Project	Pacific Symphony The Phoenicia International Festival of the Voice Piedmont Opera Pittsburgh Festival Opera Pocket Opera Salt Marsh Opera Shreveport Opera Tacoma Opera Tri-Cities Opera Union Avenue Opera UrbanArias Volcano Non-Profit Productions <sup>c</sup> Washington Concert Opera West Edge Opera Wichita Grand Opera
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<sup>c</sup> – Professional Company Member of the Association for Opera in Canada | <sup>N</sup> – Joined as a new Professional Company Member in 2021

## BUDGET 5 (Under \$250,000)

Alliance for New Music-Theatre	Experiments in Opera	Nautilus Music-Theater	Opera on Tap
Amarillo Opera	First Coast Opera <sup>N</sup>	New Camerata Opera	Orchestra of New Spain
American Baroque Opera Co.	Fresh Squeezed Opera Company	New Music Theatre Project <sup>N</sup>	Overtone Industries <sup>N</sup>
Anima Mundi Productions	Greensboro Opera	New Philharmonic Opera	Painted Sky Opera
Ars Minerva	Guerilla Opera	Nickel City Opera	Penn Square Music Festival
Astrolabe Musik Theatre <sup>C</sup>	Heartland Opera Theatre	Opera 5 <sup>C</sup>	Queen City Opera
Barn Opera <sup>N</sup>	Lakes Area Music Festival	Opera Baltimore	Re:Naissance Opera <sup>C</sup>
Boston Opera Collaborative	The Lighthouse Opera Company	Opera Company of Middlebury	Resonance Works
Boulder Opera	Little Opera Company <sup>C</sup>	Opera Cultura	Sacramento Philharmonic & Opera
Center for Contemporary Opera	The Little OPERA Theatre of NY	Opera Ebony	Saskatoon Opera <sup>C</sup>
Chants Libres, Compagnie Lyrique de Création <sup>C</sup>	Loose Tea Music Theatre <sup>C</sup>	Opera Fort Collins	Solo Opera
Chelsea Opera	Marble City Opera	Opera In The Rock	Sound the Alarm: Music/Theatre <sup>C</sup>
City Lyric Opera	MassOpera	Opera Ithaca	Teatro Grattaciolo
The Cleveland Opera	Milwaukee Opera Theatre	Opera Kelowna <sup>C</sup>	Valley Opera and Performing Arts
Cleveland Opera Theater	Mission Opera	Opera Las Vegas	Victory Hall Opera
Connecticut Lyric Opera	Musical Traditions	Opera MODO	White Snake Projects
Dell'Arte Opera Ensemble	National Sawdust	Opera NEO	Wilmington Concert Opera <sup>N</sup>

## ASSOCIATE MEMBERS

/kor/ productions	Boston Early Music Festival	Dolora Zajick Institute for Young Dramatic Voices	Italian and American Playwrights Project
ABRSM	Brevard Music Center, Summer Institute & Festival	Douglas Moore Fund for American Opera	James Toland Vocal Arts
ACMA	Buck Scholars Association	Dramatists Guild of America	Japan Performing Arts, Inc.
ACTION FOR ARTISTS	Buffalo Opera Unlimited	Druid City Opera	Jefferson Performing Arts Society
Adelphi Orchestra	Burnaby Lyric Opera	Elite Music Competition Corp	Jensen Foundation
Alaria Chamber Ensemble	Camerata New Jersey	Em2CONNECT	Joy in Singing
American Academy of Teachers of Singing	Canto Vocal Programs	Ember Choral Arts	Kimmel Harding Nelson Center for the Arts
American Composers Alliance	Cape Town Opera	Emmanuel Music, Inc.	Knights
American Friends of the Grange Festival	Capitol City Opera Company	English Concert in America	Kurt Weill Foundation for Music
AMOC*	Caramoor Center for Music and the Arts	English National Opera	League of American Orchestras
Anthony Laciura Foundation for the Arts, Inc.	Catapult Opera Company	Erling Wold's Fabrications	Light Opera of New York
Argento New Music Project	Center for Remembering & Sharing	Ex Machina	Liz-Mohn-Center
ArsMusic Concerts	Central Florida Vocal Arts	Exponential Ensemble	Loadbang Inc.
Art Song Preservation Society of New York	Chamber Music America	FAWN Chamber Creative	LOLA (Local Opera Local Artists)
Association for Opera in Canada	Chamber Music Center of New York, Inc.	Filmshop	Lyric Opera of Orange County
Association for the Promotion of New Music, Inc.	Charleston Gaillard Center	Flipside Opera & Art Song Collective	Madison Theatre at Molloy College
Association of Performing Arts Presenters	Charleston Opera Theater	Foundry Arts	Manhattan Opera Studio
Astoria Music Society / Lost Dog New Music Ensemble	Chicago Fringe Opera	Geneva Light Opera	Manitoba Underground Opera
Astral Artists, Inc.	Chicago Summer Opera	Gerda Lissner Foundation	Maryland Lyric Opera
Athena Music Foundation	Chicago Symphony Orchestra	Global Outstanding Chinese Artists Association	MasterVoices
Aural Compass Projects	Christman Opera Company	Glow Lyric Theatre	Mendelssohn Chorus of Philadelphia
Bella Music Foundation	Classic Lyric Arts, Inc.	GO Broadway	Merola Opera Program
Bells of Baddeck   The Alexander Graham and Mabel Bell Story	Classical Singing and New York in June	Gulfshore Opera	Metropolis Ensemble
Berks Opera Company	Classical Tahoe	Gustav Mahler Society of New York	Metropolitan International Music Festival
Berkshire Opera Festival	Coalition for African Americans in the Performing Arts (CAAPA)	Highlands Opera Studio	Metropolitan Opera Guild
Big Apple Chorus	Composers Collective	Holy City Arts & Lyric Opera (HALO)	Miami Lyric Opera
Bilingual Education and Cultural Perspectives, Inc.	Composers Now	Indie Opera West	Midori & Friends
Black Theatre Coalition	Con Vivo Music	Innovations en concert	MIOpera
	Congress for Jewish Culture, Inc.	Inside Broadway	More Than Musical, Ltd.
	Dance/USA	International Brazilian Opera Company	Mostly Modern Projects
	David I Martin Music Guild of NANM, Inc.	International Opera Theater of Philadelphia	Muse 9 Productions
	Diversitá Opera Arts Company	International Resource Centre for Performing Artists	Music Academy International
			Music of Remembrance
			Music Picnic

Musique 3 Femmes  
 National Arts Centre  
 National Children's Chorus  
 National Chorale  
 National Guild for Community Arts Education  
 National Opera Association  
 National Yiddish Theatre Folksbiene  
 NATS-National Association of Teachers of Singing  
 Ne. Sans Opera and Dance  
 New Century Opera  
 New Music USA  
 New Opera West  
 New York City Master Chorale  
 New York Composers Circle  
 New York Festival of Song  
 New York Flute Club  
 New York Opera Alliance  
 New York Women Composers, Inc.  
 Noree Chamber Soloists  
 North Shore Music Festival  
 North/South Consonance, Inc.  
 Olga Forrai Foundation, Inc.  
 OmniARTS Foundation Inc.  
 One Ounce Opera  
 Opera at Florham  
 Opera Australia  
 Opera Canada Magazine  
 Opera Collective  
 Opera Connecticut  
 Opera Edwardsville  
 Opera Europa  
 Opera Exposures  
 Opera Hispánica  
 Opera Huntsville  
 Opera in the Pines  
 Opera in Williamsburg  
 Opera Index, Inc.  
 Opera InReach  
 Ópera Latinoamérica  
 Opera League of Los Angeles  
 Opera Mariposa  
 Opera NexGen  
 Opera Northwest  
 Opera Project Columbus  
 Opéra Queens  
 Opera Sustenida  
 Opera Theater Oregon  
 Opera Theatre of the Rockies  
 Opera Volunteers International  
 Opera Western Reserve  
 Opera4Kids  
 OperaCréole  
 Operamission  
 Orpheus Project  
 Parthenia Viol Consort  
 Permian Basin Opera

Philharmonia Baroque Orchestra & Chorale  
 Professional Women Singers Association  
 Queens Opera Theatre, Inc.  
 Raise Your Spirits Theatre  
 Ravinia Festival Association  
 Really Spicy Opera  
 Regina Opera Company  
 Respiro Opera, NYC  
 Rhymes With Opera  
 Richard Wagner Society of New York  
 Richard Wagner Society of the Upper Midwest  
 Rondo Young Artist  
 San Francisco Opera Guild  
 SAS Performing Arts Company and Studios, Inc.  
 Savannah VOICE Festival  
 Seagle Festival  
 Sing for Hope  
 Singnasium  
 SongFest  
 Songs by Heart  
 Spotlight on Opera  
 St. Croix Valley Opera  
 Stage Manager's Association  
 Sun Valley Opera Company  
 Sunset Park School of Music, Inc.  
 Synchromy  
 Théâtre Lyrichorégra 20  
 Three Oaks Opera, Inc.  
 Time in Children's Arts Initiative  
 Toronto City Opera  
 Triangle Wagner Society  
 Uncommon Chord vocal jazz ensemble  
 United Pugliese Federation of NY  
 United States Army Field Band  
 USITT  
 Varna International  
 Victor Herbert Renaissance Project LIVE!  
 Virginia Arts Festival/John Duffy Institute for New Opera  
 Vital Opera  
 Viva Brooklyn Festival  
 Vocal Arts DC  
 Voices of Gotham  
 William Matheus Sullivan Musical Foundation  
 Women on the Verge  
 Working In Concert/Bellissima Opera  
 Yale Repertory Theatre  
 Yiddish Philharmonic Chorus, Inc.  
 Young Artists of America

## **BUSINESS MEMBERS**

8 Bridges Workshop

A to Z Theatrical Supply and Service, Inc.  
 Act 1 Tours  
 ADA Artist Management  
 AGMA Health and Retirement Funds  
 American Fundraising Foundation  
 American Guild of Musical Artists  
 AMT Public Relations  
 Arts Consulting Group  
 Arts Consulting Group Canada  
 Arts Tech Center  
 Arup  
 Aspen Leadership Group  
 Athlone Artists  
 Audrey Digital  
 Balance Arts Center  
 Beardsavvy Web Development  
 Bel Canto Boot Camp  
 Bel Canto Global Arts, LLC  
 Biaggi Arts Consulting  
 Black Tea Music  
 Blueprint Advancement  
 Boosey & Hawkes Inc.  
 Boulev'art, Inc.  
 C.F. Peters Corporation  
 Capacity Interactive  
 Catherine French Group  
 CharcoalBlue  
 City Strings & Piano  
 Connect the Arts  
 Cuyler Consulting, LLC  
 Dallas Stage Scenery Inc.  
 Daniel Teadt, Voice & Performance Coach  
 DEA Music and Art Studio  
 Dean Artists Management  
 DictionBuddy LLC  
 Domoney Artists Management  
 Duvagen Music Publishers  
 Easy-Connect | Ticket Gretchen GmbH  
 ECS Publishing  
 Étude Arts  
 Fisher Dachs Associates Inc. (FDA)  
 Fletcher Artist Management  
 Forbes International Artist Management  
 Forestage Labs  
 Freestyle Love Supreme Academy  
 G&W Entertainment LLC  
 G. Schirmer, Inc./Associated Music Publishers/Wise Music Classical  
 G2 Insurance Services LLC  
 Genovese Vanderhoof & Associates  
 Gledhill Arts Collective  
 Global Musicians and Arts Association  
 Good Roots Consulting  
 Guy Barzilay Artists, Inc.

H&K Arts Management Associates  
 Harwood Management Group, Inc.  
 IMAX  
 IMG Artists, LLC  
 Inclusive Excellence Strategy Solutions  
 Indie Opera Productions  
 Insignia Artists Management  
 InstantEncore  
 International Artist Managers' Association  
 Internationale Meistersinger Akademie  
 Intuitive Production Management  
 Ipsilon Music Press/Services  
 JAGS Consulting Ltd.  
 Jeffrey James Arts Consulting  
 Kaplan Insurance Agency  
 Ken Benson Artists  
 Kevin Duda Productions, Inc  
 Keys to Success  
 L2 Artists LLC  
 Larry Owens Live  
 Latitude 45 Arts  
 Leaf Spring Consulting  
 Loghaven Artist Residency  
 Management Consultants for the Arts  
 Marquee TV  
 Mayflower Arts Center  
 McClure Productions, Inc.  
 MidAmerica Productions  
 Miotta y Molière S.L.  
 MKI Artists, Inc.  
 Music-Fest  
 New Song Studio - Queens Music School  
 New York City Piano Academy  
 New York Guitar Academy  
 Notes for Growth  
 NYIOP International  
 Opera Bracelets  
 Opera Co-Pro, Ltd.  
 Opera Cowgirls  
 Opera Titles by Sonya Friedman  
 Operabase  
 OSSIA  
 Oxingale Music  
 Paulus Hook Music Foundation  
 Peermusic Classical  
 Philadelphia Scenic Works  
 Pinnacle Arts Management, Inc.  
 Piper Artists Management  
 Powis Studios LLC | Classical Guitar Corner  
 Productions Opéra Concept M.P.  
 Randsman Artists' Management  
 Ravenswood Studio Inc.  
 Renegade Music & Concerts

Resilient Philanthropy  
 Riverstreet Entertainment Corporation  
 Robert F. Mahoney & Associates  
 Robert Gilder and Co. International Artist Management  
 Scenery First  
 Schott Music Corp. & European American Music Dist. Co.  
 Schuler Shook  
 Schwalbe & Partners  
 SD&A Teleservices Inc.  
 Sempre Artists Management  
 ShowHive, Inc.  
 Silver Music  
 SkyBridge Strategies  
 Soundmirror Inc.  
 Stagetime  
 Stivanello Costume Company, Inc.  
 Stratagem Artists  
 Studio LIS Voice  
 Sweibel Arts Innovation & Leadership  
 TAI Group  
 Tania Stavreva Music, LLC  
 Ter Molen Watkins & Brandt  
 Tessitura Network  
 Theodore Presser Company  
 Threshold Acoustics  
 TigerBear Productions  
 TRG Arts  
 UIA Talent Agency  
 Vatic  
 VICOM Audiovisuelle Medientechnik GmbH  
 Virtuoso Advising for Artists  
 Vocal Artists Management Services  
 Wade Artist Management  
 YogaVoice®  
 Young Concert Artists, Inc.

## CAREER SERVICE AND LIBRARY MEMBERS

Anno Museum Domkirkeodden, Biblioteket  
 Baldwin Wallace University  
 Bard College | Charles P. Stevenson Library  
 Baylor University | University Libraries  
 California State University, Northridge  
 Carnegie Library of Pittsburgh  
 Carnegie Mellon University | Heinz College | Master of Arts Management  
 Cleveland Institute of Music | Robinson Music Library  
 Conservatory of Music of Puerto Rico | Amaury Veray Library  
 Florida International University | FIU Libraries

Harvard University | Harvard College Library | Eda Kuhn Loeb Music Library  
 Illinois State University | Milner Library  
 Indiana University Bloomington | IU Libraries  
 Johns Hopkins University | Peabody Institute | Arthur Friedheim Library  
 Los Angeles Public Library  
 Manhattan School of Music | Peter Jay Sharp Library  
 Mellon Foundation | Library  
 New England Conservatory | Blumenthal Family Library  
 New School | Libraries & Archives  
 Oakland University | Kresge Library  
 Oberlin College | Mary Church Terrell Main Library  
 Ohio University | OU Libraries | Collections & Digital Initiatives  
 Pepperdine University | Payson Library  
 Rider University | Westminster Choir College | Talbot Library  
 Saint Olaf College | St. Olaf College Libraries | Halvorson Music Library  
 San Francisco Conservatory of Music Library  
 Southern Methodist University | Jack and Nancy Hamon Arts Library  
 Stanford University | Stanford Libraries | Cecil H. Green Library  
 University of Cincinnati Libraries  
 University of Colorado, Boulder | University Libraries  
 University of Kansas | Libraries at University of Kansas | Watson Library  
 University of Miami | Libraries at University of Miami  
 University of Montana | Maureen and Mike Mansfield Library  
 University of North Carolina | James and Mary Semans Library  
 University of Rochester | Eastman School of Music | Sibley Music Library  
 University of the South  
 Washington University in St. Louis | John M. Olin Library

## EDUCATIONAL PRODUCING ASSOCIATE MEMBERS

Academy of Vocal Arts  
 Alcorn State University | School of Arts and Sciences  
 Aspen Music Festival and School  
 Bard College | Conservatory of Music  
 Bob Jones University  
 Carnegie Mellon University | School of Music  
 Catholic University of America  
 Centre for Opera Studies and

Appreciation (COSA)  
 Cleveland Institute of Music  
 CUNY | Hunter College | Hunter Opera Theater  
 Curtis Institute of Music  
 Florida Atlantic University | Opera Theatre  
 Florida State University  
 Hillman Opera | SUNY Fredonia School of Music  
 Hopkins Center for the Arts | Dartmouth College  
 In the Pocket NYC  
 Indiana University Bloomington | Opera and Ballet Theater  
 International Vocal Arts Institute  
 Ithaca College  
 Jackson State University | Department of Music  
 Johns Hopkins University | Peabody Conservatory  
 Juilliard School | Ellen and James S. Marcus Institute for Vocal Arts  
 Louisiana State University | College of Music and Dramatic Arts  
 Lyric Theatre at Illinois  
 Manhattan School of Music  
 Montclair State University | Dept. of Arts and Cultural Prog.  
 Music Academy of the West  
 National Opera Studio  
 Nazareth College | School of Music  
 New School | College of Performing Arts | Mannes Opera at the New School  
 Norfolk State University  
 NYU | Tisch School | Graduate Musical Theatre Writing Program  
 Oklahoma State University  
 Opera in the Ozarks  
 Opera Nuova  
 Otterbein University | Department of Music  
 Queen's University | DAN School of Drama & Music  
 Rice University | Shepherd School of Music  
 Royal Conservatory of Music | The Glenn Gould School  
 Seattle Pacific University  
 Shenandoah University | Shenandoah Conservatory | Department of Music  
 SUNY | Fashion Institute of Technology  
 SUNY | SUNY Plattsburgh | Music Program  
 SUNY | SUNY Potsdam | Crane School of Music  
 Syracuse University | Setnor School of Music  
 Texas Lutheran University | School of Music

University of Alabama | School of Music  
 University of Arizona | College of Fine Arts | Fred Fox School of Music  
 University of British Columbia School of Music  
 University of Central Oklahoma | School of Music  
 University of Cincinnati | College-Conservatory of Music  
 University of Colorado Boulder | Eklund Opera  
 University of Houston | University of Houston Libraries  
 University of Kansas  
 University of Kentucky | School of Music | Opera Theatre  
 University of Maine | School of Performing Arts | Music Division  
 University of Manitoba | Desautels Faculty of Music  
 University of Maryland | School of Music | Maryland Opera Studio  
 University of Miami | Frost School of Music | Frost Opera Theater  
 University of Michigan | School of Music, Theatre & Dance  
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 University of North Texas  
 University of Northern Colorado  
 University of Nottingham  
 University of Rochester | Eastman School of Music  
 University of South Carolina | School of Music | Opera at USC  
 University of the District of Columbia | Division of Arts and Humanities  
 University of the Pacific | Conservatory of Music  
 University of Toronto | Faculty of Music | U of T Opera  
 University of Utah | School of Music | Lyric Opera Ensemble  
 University of Western Ontario | Don Wright Faculty of Music  
 University of Wisconsin-Madison | Mead Witter School of Music  
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 Yale University | School of Music | Yale Opera

Listing current as of December 1, 2022

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## Questions about this report?

Those interested in learning more can contact OPERA America's senior research manager, Alex Ganes, at [AGanes@operaamerica.org](mailto:AGanes@operaamerica.org) or 646.699.5243. Customized analyses for Professional Company Members available upon request.



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