

## CITY OF SANTA FE

## PROFESSIONAL SERVICES AGREEMENT

THIS AGREEMENT is made and entered into by and between the City of Santa Fe (the "City") and **Santa Fe Symphony Orchestra** (the "Contractor"). The date of this Agreement shall be the date when it is executed by the City and the Contractor, whichever occurs last.

1. SCOPE OF SERVICES

The Contractor shall provide the following services for the City :

A. All required services to ensure the presentation and production of the projects as described in Exhibit A attached hereto and incorporated by reference in response to #18/40/RFQ.

B. Present opportunities for youth and/or other underserved population to benefit from the project by providing free or reduced access to the project as outlined in the application and demonstrated by the documentation and reporting of audience statistical and demographic information, including minority participation in the project.

C. Market and promote the City by utilizing the City's arts logo and credit line on all printed promotional material related to the project.

D. Promote and market the project locally and regionally; demonstrate evidence of attracting audiences through statistical and demographic information.

E. Present arts educational programs and opportunities for the Santa Fe community that increase understanding of the project's artistic discipline or work of art.

F. Encourage the cultural development of Santa Fe through Maintaining high standards of artistic excellence as demonstrated by the presentation of performances, exhibitions and /or services.

G. Strengthen the position of the arts as an integral part of Santa Fe by providing cultural benefits and contributing to the City's artistic identity and access to underserved constituencies.

H. Provide a final report to the City providing statistical and demographic information about audience attendance and the results of the project.

2. STANDARD OF PERFORMANCE; LICENSES

A. The Contractor represents that it possesses the personnel, experience and knowledge necessary to perform the services described under this Agreement.

B. The Contractor agrees to obtain and maintain throughout the term of this Agreement, all applicable professional and business licenses required by law, for itself, its employees, agents, representatives and subcontractors.

3. COMPENSATION

A. The City shall pay to the Contractor in full payment for services rendered, a sum not to exceed four thousand seven hundred fifty dollars and no cents (\$4,750.00), including applicable gross receipts taxes.

B. The Contractor shall be responsible for payment of gross receipts taxes levied by the State of New Mexico on the sums paid under this Agreement.

C. Payment shall be made upon receipt, approval and acceptance by the City of detailed statements containing a report of services completed. Compensation shall be paid only for services actually performed and accepted by the City.

4. APPROPRIATIONS

The terms of this Agreement are contingent upon sufficient appropriations and authorization being made by the City for the performance of this Agreement. If sufficient appropriations and authorization are not made by the City, this Agreement shall terminate upon written notice being given by the City to the Contractor. The City's decision as to whether sufficient appropriations are available shall be accepted by the Contractor and shall be final.

5. TERM AND EFFECTIVE DATE

This Agreement shall be effective July 1, 2018 and shall terminate on June 30, 2019 unless sooner pursuant to Article 6 below.

6. TERMINATION

A. This Agreement may be terminated by the City and the Contractor upon 10 (ten) days written notice to the Contractor.

(1) The Contractor shall render a final report of the services performed up to the date of termination and shall turn over to the City original copies of all work product, research or papers prepared under this Agreement.

(2) If compensation is not based upon hourly rates for services rendered, therefore the City shall pay the Contractor for the reasonable value of

services satisfactorily performed through the date Contractor receives notice of such termination, and for which compensation has not already been paid.

(3) If compensation is based upon hourly rates and expenses, Contractor shall be paid for services rendered and expenses incurred through the date Contractor receives notice of such termination.

7. STATUS OF CONTRACTOR; RESPONSIBILITY FOR PAYMENT OF EMPLOYEES AND SUBCONTRACTORS

A. The Contractor and its agents and employees are independent contractors performing professional services for the City and are not employees of the City. The Contractor, and its agents and employees, shall not accrue leave, retirement, insurance, bonding, use of City vehicles, or any other benefits afforded to employees of the City as a result of this Agreement.

B. Contractor shall be solely responsible for payment of wages, salaries and benefits to any and all employees or subcontractors retained by Contractor in the performance of the services under this Agreement.

C. The Contractor shall comply with City of Santa Fe Minimum Wage, Article 28-1-SFCC 1987, as well as any subsequent changes to such article throughout the term of this Agreement.

8. CONFIDENTIALITY

Any confidential information provided to or developed by the Contractor in the performance of this Agreement shall be kept confidential and shall not be made available to any individual or organization by the Contractor without the prior written approval of the City.

9. CONFLICT OF INTEREST

The Contractor warrants that it presently has no interest and shall not acquire any interest, direct or indirect, which would conflict in any manner or degree with the performance of services required under this Agreement. Contractor further agrees that in the performance of this Agreement no persons having any such interests shall be employed.

10. ASSIGNMENT; SUBCONTRACTING

The Contractor shall not assign or transfer any rights, privileges, obligations or other interest under this Agreement, including any claims for money due, without the prior written consent of the City. The Contractor shall not subcontract any portion of the services to be performed under this Agreement without the prior written approval of the City.

11. RELEASE

The Contractor, upon acceptance of final payment of the amount due under this Agreement, releases the City, its officers and employees, from all liabilities, claims and obligations whatsoever arising from or under this Agreement. The Contractor agrees not to purport to bind the City to any obligation not assumed herein by the City unless the Contractor has express written authority to do so, and then only within the strict limits of that authority.

12. INSURANCE

A. The Contractor, at its own cost and expense, shall carry and maintain in full force and effect during the term of this Agreement, comprehensive general liability insurance covering bodily injury and property damage liability, in a form

and with an insurance company acceptable to the City, with limits of coverage in the maximum amount which the City could be held liable under the New Mexico Tort Claims Act for each person injured and for each accident resulting in damage to property. Such insurance shall provide that the City is named as an additional insured and that the City is notified no less than 30 days in advance of cancellation for any reason. The Contractor shall furnish the City with a copy of a Certificate of Insurance as a condition prior to performing services under this Agreement.

B. Contractor shall also obtain and maintain Workers' Compensation insurance, required by law, to provide coverage for Contractor's employees throughout the term of this Agreement. Contractor shall provide the City with evidence of its compliance with such requirement.

C. Contractor shall maintain professional liability insurance throughout the term of this Agreement providing a minimum coverage in the amount required under the New Mexico Tort Claims Act. The Contractor shall furnish the City with proof of insurance of Contractor's compliance with the provisions of this section as a condition prior to performing services under this Agreement.

### 13. INDEMNIFICATION

The Contractor shall indemnify, hold harmless and defend the City from all losses, damages, claims or judgments, including payments of all attorneys' fees and costs on account of any suit, judgment, execution, claim, action or demand whatsoever arising from Contractor's performance under this Agreement as well as the performance of Contractor's employees, agents, representatives and subcontractors.

14. NEW MEXICO TORT CLAIMS ACT

Any liability incurred by the City of Santa Fe in connection with this Agreement is subject to the immunities and limitations of the New Mexico Tort Claims Act, Section 41-4-1, et. seq. NMSA 1978, as amended. The City and its "public employees" as defined in the New Mexico Tort Claims Act, do not waive sovereign immunity, do not waive any defense and do not waive any limitation of liability pursuant to law. No provision in this Agreement modifies or waives any provision of the New Mexico Tort Claims Act.

15. THIRD PARTY BENEFICIARIES

By entering into this Agreement, the parties do not intend to create any right, title or interest in or for the benefit of any person other than the City and the Contractor. No person shall claim any right, title or interest under this Agreement or seek to enforce this Agreement as a third party beneficiary of this Agreement.

16. RECORDS AND AUDIT

The Contractor shall maintain, throughout the term of this Agreement and for a period of three years thereafter, detailed records that indicate the date, time and nature of services rendered. These records shall be subject to inspection by the City, the Department of Finance and Administration, and the State Auditor. The City shall have the right to audit the billing both before and after payment. Payment under this Agreement shall not foreclose the right of the City to recover excessive or illegal payments.

17. APPLICABLE LAW; CHOICE OF LAW; VENUE

Contractor shall abide by all applicable federal and state laws and regulations, and all ordinances, rules and regulations of the City of Santa Fe. In any

action, suit or legal dispute arising from this Agreement, the Contractor agrees that the laws of the State of New Mexico shall govern. The parties agree that any action or suit arising from this Agreement shall be commenced in a federal or state court of competent jurisdiction in New Mexico. Any action or suit commenced in the courts of the State of New Mexico shall be brought in the First Judicial District Court.

18. AMENDMENT

This Agreement shall not be altered, changed or modified except by an amendment in writing executed by the parties hereto.

19. SCOPE OF AGREEMENT

This Agreement incorporates all the agreements, covenants, and understandings between the parties hereto concerning the services to be performed hereunder, and all such agreements, covenants and understandings have been merged into this Agreement. This Agreement expresses the entire Agreement and understanding between the parties with respect to said services. No prior agreement or understanding, verbal or otherwise, of the parties or their agents shall be valid or enforceable unless embodied in this Agreement.

20. NON-DISCRIMINATION

During the term of this Agreement, Contractor shall not discriminate against any employee or applicant for an employment position to be used in the performance of services by Contractor hereunder, on the basis of ethnicity, race, age, religion, creed, color, national origin, ancestry, sex, gender, sexual orientation, physical or mental disability, medical condition, or citizenship status.



21. SEVERABILITY

In case any one or more of the provisions contained in this Agreement or any application thereof shall be invalid, illegal or unenforceable in any respect, the validity, legality, and enforceability of the remaining provisions contained herein and any other application thereof shall not in any way be affected or impaired thereby.

22. MATCHING FUNDS

The Contractor may use the amount paid by the City pursuant to Article 3, herein, to meet matching requirements of federal or state government for the receipt of additional funds for those entities.

23. LOGO AND CREDIT LINE

A. The Contractor must include the City of Santa Fe Arts Commission logo on all printed publicity, promotion, and program materials applicable to this Agreement. In immediate proximity to the logo, the following credit line must be clearly visible and readable: "Partially funded by the City of Santa Fe Arts Commission and the 1% Lodgers' Tax."

B. Failure to provide the appropriate credit line and use of logo can result in termination of this Agreement.

24. NOTICES

Any notices required to be given under this Agreement shall be in writing and served by personal delivery or by mail, postage prepaid, to the parties at the following addresses:

City of Santa Fe:  
Arts Commission  
PO Box 909  
Santa Fe NM 87504-0909

Contractor:  
Santa Fe Symphony Orchestra  
PO Box 9692  
Santa Fe NM 87504-9692

IN WITNESS WHEREOF, the parties have executed this Agreement on the date  
set forth below.

CITY OF SANTA FE:

  
ERIK LITZENBERG, CITY MANAGER

DATE: 9/5/18

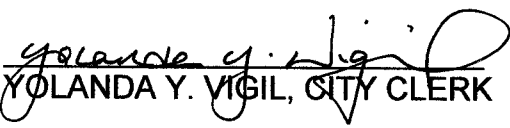
SANTA FE SYMPHONY ORCHESTRA

  
NAME AND TITLE

DATE: 9/12/18

CRS# 02-014799-00-6  
City of Santa Fe Business  
Registration # 18-00054638

ATTEST:

  
YOLANDA Y. VIGIL, CITY CLERK *dw*

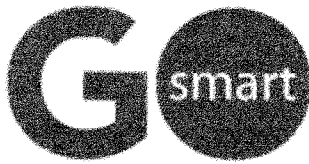
APPROVED AS TO FORM:

 8/3  
ERIN K. MCSHERRY, CITY ATTORNEY

APPROVED:

 8/30  
MARY MCCOY, FINANCE DIRECTOR *mc*

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Business Unit.Line Item



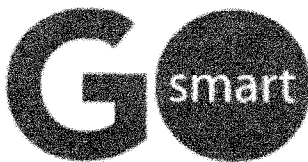
City of Santa Fe Arts Commission - 2018 Community Arts  
Development  
Santa Fe Symphony Orchestra & Chorus  
Application #18CAD0004

Primary Contact: Feliciano Warren  
Phone: (505) 983-3530  
Email: fwarren@santafesymphony.org

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**Applicant Profile**

<b>Legal Name</b>	Santa Fe Symphony Orchestra & Chorus
<b>Address1</b>	P. O. Box 9692 Santa Fe, New Mexico 87504-9692 UNITED STATES
<b>Telephone</b>	(505) 983-3530
<b>Fax</b>	(505) 982-3888
<b>Primary Contact</b>	Feliciano Warren  Phone: (505) 983-3530 Email: fwarren@santafesymphony.org
<b>Applicant Status</b>	Organization - Non-Profit
<b>Applicant Institution</b>	Performing Group
<b>Applicant Discipline</b>	Music - Orchestral
<b>Grantee Race</b>	White
<b>FEIN / TAX ID</b>	85-0331684



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## **Applicant Information**

This section of the application gathers basic information about the proposed project.

**Please state the name of the organization (or group) presenting the program.**

The Santa Fe Symphony Orchestra & Chorus

**DBA (if applicable)**

### **Project Director Information**

**Project Director Name**

Amy Worcester

**Project Director Title**

Business Operations Manager

**Project Director Email**

aworcester@santafesymphony.org

**Project Director Phone #**

(505) 983-3530

**Are you using a Fiscal Agent?**

No

**Fiscal Agent Contact Name**

**Fiscal Agent Contact Title**

**Fiscal Agent Contact Email**

**Fiscal Agent Contact Mailing Address**

**Fiscal Agent Phone #**

**The Authorizing Official should be the president or other officer of the board of directors. This person takes legal responsibility for the applicant. The Executive Director and Project Director may not serve as the Authorizing Official.**

**Authorizing Official Name**

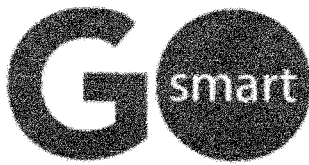
Frank Hirsch

**Authorizing Official Title**

Board President

**Authorizing Official Email**

efhirsch@gmail.com



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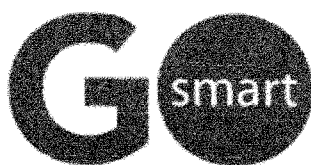
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**Authorizing Official Phone #**  
(505) 603-1156

**City of Santa Fe Business Registration # (This number must start with a "18")**  
18-00054638

**CRS #**  
02-014799-00-6



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## Project Narrative

### Project Title

Santa Fe Symphony Orchestra & Chorus 2018-2019 (35th) Season

### Amount Requested

\$6,000

### Project Start Date

2018-7-1

### End Date

2019-6-30

### Project Location

Our 35th season program offers 11 subscription concerts and two free children's Discovery Concerts at The Lensic Performing Arts Center; 2 free community concerts at the Cathedral Basilica of St. Francis of Assisi; and free musical outreach programs in 9 Santa Fe public schools, libraries (most recently quarterly presentations at the Southside Library), and senior assisted living facilities (a total of 29 performances in 16 locations) throughout the Santa Fe community.

**Provide an overview of the project for you are applying. We encourage you to address the "Who, What, Where, When and Why" of the project. Where possible, include specific artist names and titles of work.**

The Symphony seeks funding to support its 35th season of symphonic & choral performances at The Lensic; its free performances in the community; music mentoring & education for youth in Santa Fe's public schools; & outreach programs for families & residents of senior assisted living facilities.

**SUBSCRIPTION CONCERTS 2018-2019 at The Lensic.** Guillermo Figueroa, Principal Conductor

9/16/18 Double Violin Concerto: Barber, Bach & Tchaikovsky w/Sirena Huang, Elmar Oliviera

10/14/18 Musica Hispana: Ginastera, Mariano Morales, De Falla w/flutist Nestor Torres

11/17 & 18, 2018 Handel's Messiah

12/9/18 Christmas Treasures: Berlin, Faith, Tchaikovsky w/the Santa Fe Youth Symphony

12/24/18 Christmas Eve Concert: Handel, Weber, Poulenc, Sarasate with Anderson & Roe

2/17/19 Adolphe, Williams & Mahler with David Felberg, violin and Mary Wilson, Soprano

3/17/19 Adams, Mozart & Dvorak: Drew Petersen

4/14, 2019 Brahms, A German Requiem

5/18 & 19, 2019 Berlioz Anniversary

### OUTREACH CONCERTS

The Lensic

10/1/18 2 Discovery Concerts for 4th graders w/Joe Hayes, bilingual narration & video projection

Cathedral Basilica, Free Admission

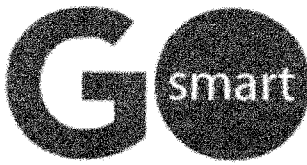
12/18/18 Carols & Choruses: Family sing-along with Symph. Chorus & Brass.

5/29/19 Memorial Day Concert w/Chorus & Chamber Ensemble

12 ensemble performances in SFPS; 5 ensemble concerts in assisted living facilities; 4

weekend Free Family concerts at S.Side Library; 1 Choral Masterworks (pay-what-you-wish) at St. John's United Methodist Church.

**How will the project provide access to and participation in the creative life of our community by youth and/or other underserved populations? Who is the intended audience for this project?**



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**Youth Arts:** Music education outreach is essential to our mission & has served as a model for other SF performing arts organizations. Our free-of-charge ed. outreach programs reach 3,455 students in public & independent schools annually. Our Kids' Classical Concerts (small in-school ed ensembles), are presented to over 1350 public school students each year. With SFPS/PASS program, each fall, all area 4th graders (approx 1,580) from 19 Santa Fe, Espanola & Pojoaque public schools attend our Discovery Concerts featuring bilingual narration & video projection; with a bilingual "Meet the Orchestra"

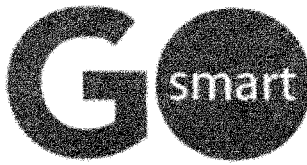
handbook (3,000 distributed per year). Our award-winning music Mentoring Program provides 950 hours per school year (25 weeks) of weekly individual or small group instruction in brass, woodwind, guitar, strings & voice. 9 Symphony musicians assist 12 music teachers in 9 schools, benefiting 525 7-12th graders. Our Instrument Scholarship Program refurbishes used instruments for use by promising SFPS music students.

**Engagement:** Our youth programming is engagement-oriented. Our new & popular FREE Family Concerts at the Southside Library bring classical music out of The Lensic to audiences w/no prior experience w/live symphonic music. We present at least 5 ensemble performances to senior living facilities annually.

**Creative Spaces:** SFSO's "We are the Music" DVD, soon to be relaunched, explores the music of 11 cultural groups that settled in the SF area. Available for download on the PBS Learning Media or Symphony website, this DVD is used nationwide by teachers across disciplines. Our unique 2-year collaboration with the SF Institute, exploring the intersection between music & math, sparked "The Majesty of Music & Mathematics," an enthusiastically received live performance with music, visuals, & narration for both adults & youth. Filmed by PBS, it'll be released for national broadcast in August of 2018. Cathedral Basilica concerts attract diverse audiences of all ages.

**Describe your organization's ability to foster the creation, production, presentation and awareness of the arts in Santa Fe. Be sure to include educational, outreach and/or economic benefits that your organization provides.**

34 years ago, a group of dedicated musicians & music lovers made a bold decision that, with its stature as a cultural mecca, the Santa Fe community was deserving of-and could sustain-a professional symphony orchestra. Since then, The Santa Fe Symphony Orchestra & Chorus continues to fulfill its mission to engage & enrich audiences of all ages & cultures in Santa Fe, Northern NM & beyond, offering orchestral and choral concerts of the highest professional quality as well as education & outreach programs for adults, seniors & youth. SFSO has long been recognized as a vital, community-focused musical organization. It is one of only two fully professional, full-sized symphony orchestras in the state & is the largest professional symphonic organization in Santa Fe. As an integral part of Santa Fe's cultural community, our aim is to be the best possible resident orchestra & to build strong relationships with those who live, work & learn here. We contribute to the local economy, promote awareness and provide access to exceptional live symphonic music for all area residents; draw visitors to Santa Fe with the quality of our product & programming, and collaborate with other local science & arts organizations & businesses. The strongest indicators of SFSO's high artistic quality & outstanding audience experience are our consistently sold-out concerts that regularly feature world-class guest artists, & sustained financial support in a community known for its artistic achievement. Our musicians have trained at institutions such as Juilliard, Northwestern & Eastman & have performed with renowned orchestras in the US, Canada, Europe & Latin America, yet choose to make their home and art here to benefit a community known for its focus on the arts. We differentiate ourselves via a governance structure in which our musicians contribute throughout every level of the organization. Our award-winning mentoring program has served as a model for other performing arts groups.



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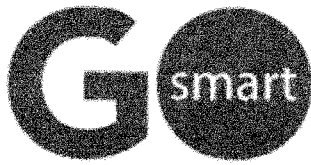
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**Describe how the qualifications of your administrative and artistic staff and volunteers contribute to your organization's standards of excellence. Give specific examples of performances, exhibitions and/or services that you provide and how your staff and volunteers have helped to shape them.**

The Symphony staff and volunteers bring extensive, well-rounded backgrounds that deliver tremendous value to the daily operations of The Symphony. Kathryn Nun has an extensive background in marketing, design, and public relations, including a wide range of software skills, plus over 12 years, nonprofit (performing arts) experience at The Symphony. Amy Worcester has worked closely with business leaders and solopreneurs growing their personal, professional, fiscal and financial services. She has over a decade of experience working in business operations, finance, human resources and marketing for private and public sector businesses. Feliciano Warren has more than a decade of communications, grant-writing, marketing, event-planning, management and fundraising experience, mainly in the nonprofit sector. The rest of the staff and volunteers are leaders in the community and have decades of experience and backgrounds in law, medicine, management, engineering, and finance to name a few. This combined experience has allowed the Symphony to expertly and efficiently further its mission to bring great music to Santa Fe.

The Symphony today includes 65 professional musicians and over 50 volunteer choristers-all New Mexico residents. Our musicians have trained at esteemed conservatories such as Juilliard and Northwestern and have performed with globally-recognized orchestras, including the Jerusalem Symphony Orchestra, the Chicago Symphony Orchestra, and the Dallas Symphony Orchestra. Over the years, The Symphony has been praised for its diverse programming, from beloved masterworks to premieres by such noted composers as Pulitzer Prize-winner George Walker and Academy Award-winners Elmer Bernstein and Dave Grusin. We are often privileged to work with renowned guest artists, such as Susanna Phillips, André Watts, and Anne Akiko Meyers, and conductors including Carmen Helena Télez, Tom Hall, and JoAnn Falletta.





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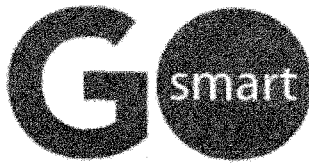
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### Audience by Age

Please provide the following information using numerical responses; do not provide percentages.

	<b>Audience</b>
0-5 yrs	39
6-17 yrs	3,455
18-24 yrs	423
25-55 yrs	867
55-64 yrs	3,503
65+ yrs	4,885
<b>SubTotals:</b>	<b>13,172</b>
<b>Grand Totals:</b>	<b>13,172</b>



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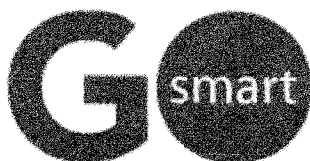
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## Audience Demographics

Please provide the following information using numerical responses; do not provide percentages.

	<b>Audience</b>
American Indian/Alaska Native	194
Asian	231
Black/African American	118
Hispanic/Latino	3,622
Native Hawaiian/Other Pacific Islander	11
White	8,996
<b>SubTotals:</b>	<b>13,172</b>
<b>Grand Totals:</b>	<b>13,172</b>



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## Marketing and Promotion Plan

Please provide a detailed explanation of planned marketing and promotional activities related to the project. Be sure to include examples of the quality of the project's marketing and promotional materials as supplemental application materials (see Support Material).

### Discuss the paid advertising plans including print and digital platforms. Include details such as the name of publication, type and frequency of the advertisement, etc.

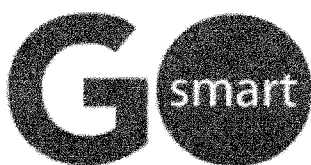
PRINT: For each subscription performance taking place at The Lensic in FY19, paid advertisements will be purchased in the Santa Fe New Mexican "Daily" and Pasatiempo sections (two 1/2 page PASATIEMPO and two 1/4 page Sunday ads, plus one 1/4 quarter page ad in the Friday Venue section of the Journal North). For all FREE and Pay-What-You-Wish performances, 4 Community Bulletin Board announcements will be placed on the two Wednesdays and Sundays prior. Per day, \$5 will be budgeted for Google AdWords ads to be placed for all subscription performances at The Lensic (Target: United States and Canada; 15-20 keywords; potential reach: 27+ clicks and 1K+ impressions). FaceBook ads will be purchased to run twice a month to boost social media postings for all subscription, FREE, and Pay-What-You-Wish performances (Target: United States: Las Vegas [+25 mi], Nevada; Albuquerque [+50 mi], Las Vegas [+25 mi], Santa Fe [+50 mi] New Mexico; Age: 18 - 65+.); and 1 ad in Santa Fe Chamber of Commerce Directory. DIGITAL ADS: For select subscription concerts, digital ads will run in the Journal North (Target: Abq, Dallas, Denver, Phoenix, Canada, Mexico; incl.: Audience Extension & Targeting, Contextual Targeting Run-of-Network, Retargeting, Mobile Location Retargeting, and 25,000 email blasts including Canada and Mexico). TRADE ADS: 2 with New Mexico Magazine, 4 in each of the quarterly Lensic Met Prog. Books, 1 in the: Desert Chorale Prog.Book, SF Chamber Orchestra Prog. Book, The Catalogues.

### Discuss the online platform on which the project will be promoted such as websites, blogs, email blasts, links, search engines, etc.

The project will be promoted on The Symphony website; Constant Contact email blasts, monthly video promotion & concert programming e-notes relative to each concert; and Local Host/Microsoft Outlook email blasts. Promotions will be enhanced through SEO: Google Analytics; audience targeting pixels made available through digital ads with Journal North, Live streaming on FaceBook and Instagram, with additional promotion via radio interviews/podcasts; Video blogs will be placed on Symphony website for various concerts, in addition to Facebook (Target: United States: Las Vegas [+25 mi], Nevada; Albuquerque [+50 mi], Las Vegas [+25 mi], Santa Fe [+50 mi] New Mexico; Age: 18 - 65+.), Twitter, Instagram & The Symphony's Youtube Channel; Event Calendars: Santa Fe New Mexican, New Mexico Magazine, BBC Magazine (ConcertDiary) The Lensic/TicketsSanta Fe, KRZA radio, Rio Grande Sun, KSJE radio, Albuquerque & Journal North (Spingo), Event Lister, Tourism Santa Fe, Eventful, Center for Nonprofit Excellence, Santa Fe Reporter; Interactive: santafe.com, Santa Fe CVB; Music Services: Spotify, Pandora; The Symphony Youtube Channel. Ongoing website & event calendar updates; pre-season (annually), monthly, weekly, then daily email blasts-closer to events; 4 to 6 times per year live streaming; and monthly video blogs will take place.

### Describe the social media platforms you will leverage to promote the project. Be sure to include information on the reach of each platform and the frequency with which promotion occur.

The Symphony will provide ongoing updates to its patrons through pre-season (annually), monthly, weekly, and daily-closer to events-Social Media platforms which include: Facebook, Twitter, Instagram, and Youtube. An increased number of images will be uploaded to Tumblr for those who continue to use that platform as an image sharing base. The project plan includes 5 to 7 posts weekly to both Instagram and FaceBook, with a minimum of 3 to 5 posts on Twitter. Individual promotions to our email list will amp up the subscriptions to The Symphony's Youtube Channel, with cross video postings to Instagram, Facebook and Twitter. All subscription concerts will have their own Events created in Facebook, with target marketing (United States: Las Vegas [+25 mi] Nevada; Albuquerque [+50 mi], Las Vegas [+25 mi], Santa Fe [+50 mi] New Mexico; Age: 18 - 65+.). Musicians and Board member will be encouraged to upload video and other digital files to our various social media platforms both pre-concert and post-concert, and from backstage at The Lensic. This encouragement



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Development  
Santa Fe Symphony Orchestra & Chorus  
Application #18CAD0004

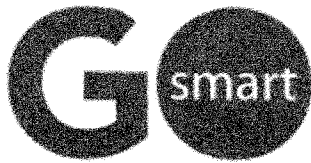
Primary Contact: Feliciano Warren  
Phone: (505) 983-3530  
Email: fwarren@santafesymphony.org

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will also extend to guest soloists who have national and international followings, ultimately increasing our followers and potential visitors to Santa Fe.

**Describe in detail the public relations work that will promote the project. Be sure to include the name of news outlets that will be approached, the type of group that will be reached, etc.** For this project, annual and monthly Press Releases, in addition to targeted Press Packets, will be provided to media outlets through US Mail, direct email, and email blasts to nearly 4,000 contacts in Constant Contact and Santa Fe Choral Groups. Email lists will be purchased to reach target key destinations such as Albuquerque, Dallas, Fort Worth, Denver, and Canada Concierge Cards (rack cards) and email content will be submitted to local hotels; Radio Interviews with Symphony directors, guest conductors, soloists, narrators will take place on KHFM, KBAC Radio Free Santa Fe, and KRZA Radio in Colorado; Announcements & Promotions will take place at Santa Fe Chamber of Commerce meetings; and through The Symphony Musicians and Choristers, mailings to local churches. Cross promotion with business partners and local performing arts groups will also take place by cross/sharing email lists and distribution of fliers throughout Santa Fe and Albuquerque. The Symphony is also in the process of increasing members on its Events Committee who not only assist in the promotion of special events, but are also encouraged to seek out new subscribers and donors. A strong relationship with Sotheby's International Realty created a collaboration with their agents, wherein buyers of Santa Fe homes over 850K are hand-delivered a Welcome Packet which includes ticket vouchers for the Santa Fe Symphony. Through this program we have made contact with over 2,000 potential Symphony music lovers.

**Describe the types of printed materials used to promote the project. Be sure to include how the materials will be distributed and/or reach the hands of potential audience members.** 15,000 Santa Fe Symphony Season Brochures will be printed in full color on 24 or more pages, with 13,000 being circulated through direct mail for circulation to a target mailing list of current and potential patrons; 500 Symphony Pre-Season and Mid-Season Brochures (Trifold) will be distributed to over 6,000 contacts via direct mail. Over 9,000 Symphony Program Books will be distributed to visitors to The Lensic, Cathedral Basilica of St. Francis of Assisi, St. John's United Methodist Church of Santa Fe, Santa Maria de la Paz; 20,000 Lensic Ticket Stub advertisements will provide discount offers on the reverse side to attract new patrons to Santa Fe concerts: available by entering a PROMO CODE online or via telephone. The offer will be available to first-time concertgoers. The Symphony ticket envelopes will also include promotional offers for concert attendees to return to future performances throughout the season by taking advantage of a 20% discount. Concert and special event fliers, and posters, will be posted at all performance venues, local businesses, churches, schools and the Santa Fe Chamber of Commerce; Concierge cards (rack cards) will continue to be placed at local hotels and restaurants throughout Santa Fe; Symphony staff, Board or Directors, and Committee members will be encouraged to circulate their business cards with The Symphony contact details and website address to more aggressively encourage engagement with potential concert goers and Symphony supporters.



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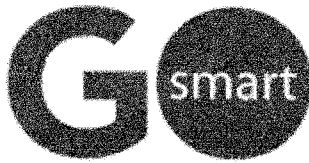
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### Three Year Organizational Budget

Please present organizational budget information for last, current and next fiscal year. Do not include In-kind. Enter income as a positive numbers and expenses as negative numbers. Applicants that are part of a larger institution/organization (colleges/universities, tribal entities, other governments, etc.) should submit organizational budget information for the department with oversight of the proposed program, not the entire institution.

Income	Last Year	Current Year	Next Year
Earned Income	583,332	504,750	541,000
Unearned Income	753,791	725,600	776,000
<b>SubTotals:</b>	<b>\$1,337,123</b>	<b>\$1,230,350</b>	<b>\$1,317,000</b>
<b>Expenses</b>	<b>Last Year</b>	<b>Current Year</b>	<b>Next Year</b>
Expenses	-1,290,436	-1,240,915	-1,316,150
<b>SubTotals:</b>	<b>\$-1,290,436</b>	<b>\$-1,240,915</b>	<b>\$-1,316,150</b>
<b>Income Totals:</b>	<b>\$46,687</b>	<b>\$-10,565</b>	<b>\$850</b>



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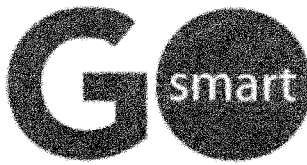
Primary Contact: Feliciano Warren  
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### Project Income

Please enter the income for the project as planned during the contract year. Reflect only income related to the project.

	Cash Applicant Request		In-kind
Tickets/Admission	440,000	0	0
Memberships/Subscriptions	0	0	0
Other Earned Income	102,000	0	0
Business/Corporate Support	60,000	0	26,000
Foundation Support	170,000	0	0
Individual Support	471,000	0	20,000
Other Government Support	10,000	0	0
Applicant Cash	58,000	0	0
Arts Commission Request	6,000	6,000	0
SubTotals:	\$1,317,000	\$6,000	\$46,000
Income Totals:	\$1,317,000	\$6,000	\$46,000



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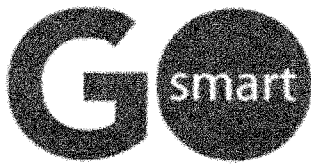
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### Project Expenses

Please enter the income for the project as planned during the contract year. Reflect only income related to the project.

	<b>Applicant</b>	<b>City Request</b>	<b>In-Kind</b>
Administrative Salaries	250,000	0	0
Artistic Salaries	430,000	0	0
Marketing/PR Salaries	50,000	0	0
Administrative Fees & Services	75,000	0	14,000
Artistic Fees & Services	84,000	0	20,000
Marketing/PR Services	56,700	6,000	6,000
Advertising	58,000	0	0
Printing/Publication	48,950	0	0
Materials/Supplies	10,000	0	0
Production Expenses	70,000	0	0
Travel (do not request City funds)	30,000	0	6,000
Rent/Mortgage	29,000	0	0
Remaining Expenses	124,500	0	0
<b>SubTotals:</b>	<b>\$1,316,150</b>	<b>\$6,000</b>	<b>\$46,000</b>
<b>Expense Totals:</b>	<b>\$1,316,150</b>	<b>\$6,000</b>	<b>\$46,000</b>



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## Financial Narrative

Explain the financial information presented. Keep in mind reviewers look for a diversity of income sources, the earned to unearned income mix, and the stability of the organizational budget from year to year. You are encouraged to address any significant increases/decreases between fiscal years; plans for reducing any deficit, as well as the factors that contributed to the deficit; any significant changes in funding sources; and any other important information.

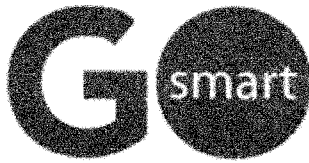
**Explain the financial information presented. Keep in mind reviewers look for a diversity of income sources, the earned to unearned income mix, and the stability of the organizational budget from year to year. You are encouraged to address any significant increases/decreases between fiscal years; plans for reducing any deficit, as well as the factors that contributed to the deficit; any significant changes in funding sources; and any other important information.**

The Symphony enjoys generally stable income sources, including subscription and individual ticket sales; annual individual & business donations; city, state and foundation grants; and an annual contribution to Symphony operations (approx. 10% of the ops budget) from The Foundation for the Santa Fe Symphony, which oversees and manages our endowment fund that currently stands at approximately \$2.8 million.

There was a moderate surplus in 2016-2017--\$46,687--of which a portion was restricted to 2017-2018 Music Education programs. The unrestricted amount of the surplus allowed The Symphony to run a small operational deficit in the 2017-2018 budget, as shown in the Three Year Organizational Budget.

Last year saw better-than-anticipated fundraising (unearned) income due to a substantial individual donation. This year's budget for both earned and unearned income reflects our generally conservative approach to income projection. However, early on in FY 2018 we received, from two dedicated Symphony patrons, commitments to match, dollar-for-dollar, up to \$150,000 raised from new donors or raised in excess of a donor's prior year's giving level. We were thrilled to complete the matching campaign in February 2018, and the amount that we have already raised in excess of this year's budgeted unearned income has been applied to next year's budget and will cover the increased expenditures described below, allowing The Symphony to avoid a deficit.





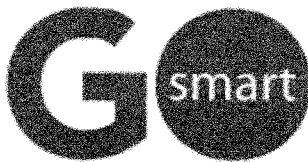
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## Sample Instructions

Before uploading samples, please read the following directions: Artistic Samples Please complete title, date, artist, media, and dimensions for each sample. Note that the total viewing time cannot exceed three minutes. These samples are critical to your review. The artistic quality is judged based on the samples provided. Please include high-quality samples that are reflective of both the overall artistic quality of your organization as well as of the quality of the proposed project. Other Samples Submit up to three samples of promotional materials, reviews from past projects and/or education materials. These materials are used to judge the effectiveness of marketing and promotion, overall artistic quality and quality of educational programs. If you referenced educational materials in the narrative please include a sample of those materials. Artistic and Administrative Biographies (Do not include resumes.) Provide brief biographies of key artistic, administrative and educational staff, including contractors or volunteers who will be involved in the project. Be sure to highlight relevant educational and professional experience. (Total of 2-page maximum) Organizational History Include a brief history of the organization. (1-page maximum) Board List Submit a list of your organization's board members. The list should include their name, professional affiliation and city of residence. Please use an asterisk as you wish to note diversity. (1-page maximum) Organizational Chart Include an organizational chart that visually describes the administrative/decision-making structure of your organization or group. (1-page maximum) IRS Exemption Letter Provide a copy of the IRS letter granting your organization's 501 (c) 3 status. Please include any relevant addenda or amendments. Incorporation Certificate Provide a copy of your State of New Mexico Incorporation Certificate. This document is issued by the State. IRS Form 990 Please include Page 1 of your IRS Form 990 for the most recently completed fiscal year.



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## Samples & Attachments



Video Media: Digital File  
Title: THE MAJESTY OF  
MUSIC & MATHEMATICS  
Artist 1: The Santa Fe  
Symphony Orchestra  
Collab. 2: New Mexico PBS  
Collab. 3: Santa Fe Institute  
Year Created: 0

[Music &  
Math Mars Symphony-  
SFARTS FY19.mp4](#)



Audio Media: Digital File  
Title: RUSSIAN EASTER  
FESTIVAL OVERTURE  
Artist 1: Composer: Nicolai  
Rimsky-Korsakov

[Audio Rimsky-  
Korsakov Russian  
Easter  
Overture TheSantaFeS-  
ymphony.mp3](#)



Audio Media: Digital File  
Title: (COPY)  
BACCHANALE FROM  
SAMSON & DELILAH  
Artist 1: Composer: Camille  
Saint-Saens

[Bacchanale from  
Samson & Delilah.m4a](#)



Title: 2017-2018 SEASON  
BROCHURE  
Artist 1: The Santa Fe  
Symphony Orchestra &  
Chorus  
Completed: 2017  
Published: 2017  
Publisher: The Santa Fe  
Symphony Orchestra &  
Chorus

[2017-2018 Season  
Brochure1.pdf](#)



Title: 2018-2019 SF  
SYMPHONY  
SUBSCRIPTION SEASON  
Completed: 0  
Published: 0  
Publisher:

[2018-2019 Subscription  
Season The  
Symphony\\_01.pdf](#)



Title: MAJESTY OF MUSIC  
& MATHEMATICS  
PROGRAM FOR PBS  
FILMING  
Completed: 0  
Published: 0  
Publisher:

[Majesty of  
Music June 2017 PBS\\_SF  
Arts 2018-19.pdf](#)



Title: KEY  
ADMINISTRATIVE,  
ARTISTIC & VOLUNTEER  
PERSONNEL  
Completed: 0  
Published: 0  
Publisher:

[Key Personnel.pdf](#)



Title: SFSOC  
ORGANIZATIONAL  
HISTORY  
Completed: 0  
Published: 0  
Publisher:

[History of the Symphony  
updated 2018.pdf](#)



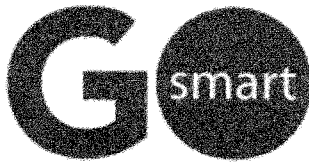
Title: BOARD LIST  
Completed: 0  
Published: 0  
Publisher:

[SFSOC BOD Member  
List January 2018.pdf](#)



Title: SFSOC  
ORGANIZATIONAL FLOW  
CHART  
Completed: 0  
Published: 0  
Publisher:

[SFSO - Organizational  
Flow Chart 2016-17.pdf](#)



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## Samples & Attachments (Continued)



Title: IRS EXEMPTION  
LETTER  
Completed: 0  
Published: 0  
Publisher:

[IRS Determination  
Letter, updated 4-22-13.  
pdf](#)

Title: INCORPORATION  
CERTIFICATE  
Completed: 0  
Published: 0  
Publisher:

[Incorporation Certificate.  
pdf](#)

Title: CITY OF SANTA FE  
BUSINESS  
REGISTRATION  
Completed: 0  
Published: 0  
Publisher:

[City of Santa Fe  
Business License.pdf](#)

Title: IRS FORM 990  
Completed: 0  
Published: 0  
Publisher:

[IRS Form 990.pdf](#)