THE COLORADO MUSIC FESTIVAL AND CENTER FOR MUSICAL ARTS:

A CASE STUDY AND EVALUATION

by

CODY WILLIAM GOETZ

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Dr. Alejandro M. Cremaschi

Dr. Jeffrey C. Nyitch

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Abstract

Goetz, Cody William (M.M., College of Music)

The Colorado Music Festival and Center for Musical Arts: A Case Study and Evaluation

Thesis directed by Professor Alejandro M. Cremaschi

This qualitative case study seeks to describe and analyze how the Colorado Music Festival and Center for Musical Arts (CMF-CMA), a nonprofit arts organization in Boulder County, Colorado, carry out their dual mission as a community music school and classical music festival nearly a decade after their merger. Formed through a joint merger in 2009, the organization bridges non-competitive industries of music education and concert promotion thereby creating a unique entity within the arts nonprofit industry in Colorado. The research uses qualitative methods of data collection including interviews with organization stakeholders, primary documents such as festival season and school programming booklets, IRS 990 tax returns, and personal observations. A brief historical timeline of the organization, financial analysis, value-word collection, and SWOT (strengths, weaknesses, opportunities, and threats) analysis interprets the data collected into meaningful conclusions. The research concludes that the merger helped the organizations financially while creating new challenges for organizational identity, branding, and articulated values. While the scope of the research is broad, additional study is needed to evaluate these new challenges as well as gather an external perspective of the organization from festival patrons, school attendees, and community members.
This thesis is dedicated to:

Alejandro, for his constant and supportive mentorship during my degree;

Katie, the best mentor-turned-friend I could ever ask for in this life;

Emmanuel, my partner that kept me sane throughout my graduate studies and inspires me daily.

The Colorado Music Festival and Center for Musical Arts stakeholders, for their immense heart and persistent hard work that makes this valuable organization thrive.
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Chapter I

Introduction

Music education and performance are intricately related human practices. In general, to produce a musical performance, one needs to have, at the very least, a basic understanding of rhythmic and musical elements, technical disposition, and music expressivity. These skills are facilitated through a didactic process in which a teacher uses a variety of pedagogical skills to impart knowledge and develop the musical skills in the student. In some cases, this process is undertaken by a student for the sheer joy of learning a new skill, but oftentimes it is goal-oriented. Typically, the goal is a performance of a musical work in a public or semi-private setting for a group of people.

If music education and performance are related practices, one might intuit that these practices would be found together at organized institutions. This is often the case at institutions of higher education where formal programs issue degrees in music. Essential to the mission of these institutions are public performances by professional musicians, either the faculty or guest artists, as well as student performances. Therefore, the phenomena of music education and performance exist at the highest levels of institutional education to serve for the professional training of musicians, and to feature performances of current musician professionals. However, the majority of the music education opportunities are for highly advanced, pre-professional students, and the intent and purpose is to train these students for professional careers in music.
In a non-higher-education institution, music education and performance are not as equally emphasized. Public and private schools often focus heavily on the practice of music education with only end-of-term performances put on by the students for fellow classmates, friends and family, and other community stakeholders. Typically, a concert series of professional artists is not part of the educational experience. In the nonprofit arts industry, it is often the case that individual organizations are either centers of music education, such as community music schools, or presenting organizations, such as music festivals or established orchestras, each with different missions on how to best serve the general public. Most community music schools do not provide regular, professional musician performances. Although music festivals provide educational opportunities, most do not demonstrate the focus on community music education.

Therefore, when an arts organization such as the Colorado Music Festival and Center for Musical Arts (CMF-CMA) provides both year-round community music education and professional music performance through a summer music festival, it demonstrates a distinctive and unusual model. The CMF-CMA was the result of a 2009 merger of the Colorado Music Festival (CMF) in Boulder, Colorado and the Rocky Mountain Center for Musical Arts (RMCMA) in Lafayette, Colorado. The literature review for this study includes a review of community music schools and music festivals operating in Colorado, which demonstrates the uniqueness of this organization. Therefore, this formal research investigation of the CMF-CMA seems appropriate and useful to the nonprofit arts industry.
Purpose of the Study

The purpose of this study is to describe and analyze how, after the merger, the CMF-CMA carried out its dual mission as a community music provider and classical music festival. This research project attempted to answer this question using a qualitative case study methodology. The study constructs a brief, historical timeline of the respective organizations before and after their merger. It also examines financial trends since the merger and asked stakeholders to examine the organization through a SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis and value words. The data includes interviews with CMF-CMA staff and board stakeholders, financial records, and primary documents related to the organization’s programming. Finally, the discussion and conclusion sections provide an analysis that may be important to improving the organization’s services to the community.

Goals of the Study

This study was designed to provide specific insight into the CMF-CMA for the community music and arts administration research community and organizational stakeholders. The conclusions of this study are not intended to provide generalizable results to other organizations. However, it is the researcher’s hope that the CMF-CMA stakeholders may discover examples of best practices as well as areas of improvement for the organization based on the conclusions of this research.
Chapter II Literature Review

Introduction

As part of the research process, a literature review is conducted to provide an “opening context or background” (Booth, 2013, p. 105) as a “written narrative” (Sampsel, 2013, p. 135). Typically, this surveys the body of research in order to demonstrate the gaps of knowledge and situate the research project “in the context of other research” (p. 105). Given this perspective, it seems appropriate that a literature review for this case study would situate the CMF-CMA within the theoretical concepts of the community music school and music festival while demonstrating the organization’s place within the nonprofit arts industry in the state of Colorado. Therefore, a review that surveys these concepts and industry competitors follows.

Community Music: Approaches and Definitions

Community music is a complex construct that has been defined in different ways depending on the analytical lenses and the cultural context. When definitions are given, they are often broad and all-inclusive. The following section presents frameworks and definitions developed by several theorists of the Western academic tradition.

In Western academia, several compendiums on the field of community music have been written within the past decade in order to observe the inner workings of these diverse practices. *The Oxford Handbook of Community Music* (Bartleet & Higgins eds., 2018) is the most recent compendium of research that looks at the field through five specific lenses: (1) contexts of community music, (2) social transformations, (3) community music and politics, (4) disciplinary
intersections with community music, and (5) community music and education. The first of these lenses provides case studies that show “the breadth of places where community musicians can be found” with the intent to “inspire (re) definitions or frameworks for understanding the diverse contexts of community music in the twenty-first century” (p. 21). The second lens includes case studies that demonstrate community music as “a force for social change around the world” (p. 173). Community music and politics “explores some of the politics and policies influencing community music, and the ways in which community music is influencing politics and policies, particularly in the area of social change” (p. 299). The fourth part of the compendium and seeks to explore the field’s intersections with “other forms of music-making, as well as other fields...within and beyond the creative arts” (p. 449). Finally, the fifth section surveys the variety of community music programs globally and the development of “appropriate curriculum and resources for this increasingly complex purpose” (593). Case studies from across the globe and community music contexts explore these concepts.

Published before the Oxford handbook, Community Music Today (Veblen, Messenger, Silverman & Elliott, 2013) traces the field through four frameworks: (1) Community Music in Global Context, (2) Interconnections, (3) Marginalized Musics and Communities, and (4) Performing Ensembles: Artistry, Advocacy, and Social Justice. Similarly, the essay collection explores these concepts on a global scale through the case study model. The first part explores community music practices on five continents. The second examines interconnections that are created in community music between generations, schools and universities, and digital platforms. The third part discusses inclusive facilitation practices and community engagement strategies for diverse populations, while the fourth part focuses on ensembles.
Another model of scholarly community music analysis consists of the work of Ailbhe Kenny in her work, *Communities of Musical Practice* (2016), based on the “communities of practice” framework theorized by Étienne Wenger-Trayner, which is defined broadly as “groups of people who share a concern or a passion for something they do and learn how to do it better as they interact regularly” (p. 11). Kenny supports her assessment through case studies of community musical groups in Ireland. A cousin to the community music compendiums includes *The Oxford Handbook of Music Making and Leisure* (Mantie & Smith eds., 2017), which attempts to explore music-making and leisure through “interdisciplinary intersections, commonalities, differences, and disjunctures in scholarship” (p. 3).

Given the recent publication of these Oxford compendiums with their global and interdisciplinary focus, it seems that the field is beginning to take a first step at establishing a baseline theory of community music. This attempt, however, brings us no closer to an exact definition. This is partly because of the field’s global diversity, and researchers who are hesitant to create boundaries to a field, that, from its conception, has been borderless. Nevertheless, the lack of specificity highlights the commonalities and differences across communities of practitioners and sets the stage for further investigation. If community music adopts set parameters, Bartleet and Higgins (2018) suggest that “rather than asking what community music *is*, we should be asking what community music *does*” and that “definitions need to always be contextualized, contested, and never pinned down” (p. 14).

Therefore, in the case of the CMF-CMA, an examination of community music practices in Western-dominant culture will be examined and compared in order to situate the organization within the field’s spectrum. Primarily, philosophies of community music from the United Kingdom, the Nordic region (Norway, Sweden, and Finland), Australia and New Zealand, and
the United States will be discussed briefly. Each region historically defines community music and its goals based on the cultural values from which it arose, and therefore vary significantly.

Steeped in the traditions and experiences of the United Kingdom, Lee Higgins (2012), a leading theorist and practitioner on community music, sees it as “an approach to music-making outside of ‘formal’ music institutions” (p. 14) and defines it as “a musical practice that is an active intervention between a music leader or facilitator and participants” (p. 21) with the desired result of social transformation. In the Nordic countries, community music is viewed differently. It is seen as activities that grow participant identity and confidence through “a wide range of musics and music-related activities and imply a focus on lifelong learning and an open-access attitude” (Karlsen, Westerlund, Partti, and Solbu, 2013, p. 41). The view of community music activities in the Nordic region “exists in and contributes to the extensive interplay between informal or formal learning situations or practices” (p. 41). Similar to the Nordic regions of Europe, community music theorists in Australia and New Zealand draw broad strokes to define the practice as:

- a group activity where people join together to actively participate in the music-making process. Musical interactions include playing, listening, watching, moving, creating, and recording...community music encompasses a wide and diverse range of cultural traditions, musical genres, and practices, which reflect and enrich the cultural lives of the participants and their broader communities (Bartleet, Brunt, Tait, and Threlfall, 2013, p. 79-80).

In the United States, scholars have analyzed community music through the scope of amateur musician groups, associations, and community music schools rooted within late nineteenth-
century themes of social integration and the development of national identity. Bush and Krikun (2013) suggest that community music activities have included:

a panoply of musical styles and practices, encompassing community music schools, community bands, orchestras, choruses, church choirs and bands, labor choruses, industrial music groups, drum and bugle corps, and many other informal musical congregations, such as drum circles and jam sessions (Bush and Krikun, 2013, p. 13).

Their primary focus is on those communities of music that have been supported by the dedication of “professional organizations of musicians and music educators and non-profit organizations” (p. 16-17). Relevant to the CMF-CMA is the concept of the community music school as the CMA (formerly RMCMA) was founded on the principles and traditions of the settlement schools (Stakeholder Eleven). To illustrate the impact of the community music school movement in the United States, a brief discussion follows.

Baranski (2010) discusses the origins of community music in the early 20th century immigrant settlement houses of major U.S. cities. The most famous example from this era was the Hull House in Chicago, which provided residents with basic necessities and programming that developed creative skills in art, music, and drama. There was an emphasis on building self-esteem and community across ethnically diverse populations. Egan (1989) discusses how independent music schools evolved from the settlement houses through the foundation of The National Guild of Community Music Schools (now the National Guild for Community Arts Education) in 1937. Egan suggests that, out of the houses, a movement of community music was created:

to promote national culture through music based upon democratic principles. Such schools are unique in that they combine a high grade of music teaching with the
fundamental principles that music is a vital part of living and is an essential element in
the enrichment of the human spirit (Egan, 1989, p. 174-175).

Nearly eighty years after its founding, the National Guild for Community Arts Education
redefined its vision of community music from defining and molding national culture to one that
is inclusive of the variety of communities it serves. Its new vision for community arts, which
includes community music, envisions “a nation where arts education is accessible and embraced
as essential for human development and healthy communities” with the mission “to ensure all
people have opportunities to maximize their creative potential by developing leaders,
strengthening organizations, and advocating for community arts education” (National Guild for
Community Arts Education, 2019).

For the purposes of this study, community music will be defined within the context of the
settlement school history and the vision/mission established by the National Guild. It embodies
the elements of “lifelong learning, music as leisure, cultural diversity, improvisation, and popular
music pedagogy” (Bartleet and Higgins, 2018, p. 4). Community music is the manifestation of
music education and performance on a weekly basis for a set term administered through specific
programs and departments by a nonprofit organization.

Colorado Community Music Schools: A Review

A review of community music schools currently operating in the state of Colorado is
essential to provide the current industry context for the CMF-CMA. I have limited the review of
institutions that are currently members of the National Guild for Community Arts Education
since the CMF-CMA is a Guild member. One exception is the Parlando School of Musical Arts
due to its presence in the Boulder community and its proximity to the CMA. To the best of my
knowledge, such a review has not been done before. Therefore, I have summarized select information to create a profile for each organization, which includes details such as its location, history (if listed), core values or mission statement (if listed), the music program offerings and for whom these programs are designed, and festivals (if any). The profiles were created based on information from each organization’s website during a period of four months, September to December 2018, with a brief update in September 2019. Information may have changed due to the fluid nature of non-profit programming. Each organization profile is detailed below and not listed in alphabetical order.

Carbondale Arts (2018) is a non-profit arts organization in Carbondale, Colorado. Founded in 1974, the mission is to promote “arts, artists, arts education, cultural activities and events” through “creativity, community, and volunteerism” in the Roaring Fork Valley Area. Most of the programming of Carbondale Arts is in the form of art classes for the community, but the organization does provide piano lessons in Spanish through one faculty member who teaches piano to thirty students age three to seventeen on Fridays after school (Carbondale Arts, 2018).

Founded in 1994, the Colorado Springs Conservatory (2018), is based in Colorado Springs, Colorado with the mission to “inspire, motivate, and challenge students, to aspire to their highest potential as human beings and artists, through arts immersion studies, and community arts advocacy” (Colorado Springs Conservatory, 2018). This institution is centered on developing professional musicians in either music, theater, or dance. The programming offered is highly sequential, beginning with the Tiny Tremolos, a weekly group class that develops musicianship and introduces theater and classical music to children ages four to five. The Novice Program is next in the sequence for students age six to seven. It continues the concepts of the former program and allows students to begin taking private piano lessons and
participate in theater productions. The Bridge to Core prepares students age eight to nine for the CORE program by continuing the educational goals of the previous programs and adds instrument studio and theater classes. The CORE program is designed to provide a “comprehensive music and performance education,” which requires students to participate in weekly private instrument, voice, theater or dance lessons, in 45-minute group piano and instrument studio classes, and in a weekly theory class, with an option to take courses in the Recording Arts track to build skills in writing and producing music. (Colorado Springs Conservatory, 2018). The CSC COMPANY and YOUNG COMPANY, taken alongside CORE are advanced programs designed to prepare students for careers “in the music industry, or for auditions into a college or conservatory program.” (Colorado Springs Conservatory, 2018).

Foundations Music School (2018) is a community music institution based in Ft. Collins, Colorado. Founded in March 2006, its mission is to provide “high-quality arts opportunities to individuals of all ages, abilities, ethnicities, and incomes” through classes that “nurture the love of music in a developmentally appropriate way” (Foundations Music School, 2018). The school offers an Early Childhood Program for children up to age five with a focus on cognitive and physical development, while exploring music through listening, group music-making, playing instruments, singing, movement, and music games. The program offers regular classes throughout the semester for forty-five minutes or a focus camp setting for several hours once a week. Following the Early Childhood Program, for students ages five and older, the school provides group instrument classes, including a group piano and Suzuki-style group violin class. The community music school also offers private lessons in piano, voice, guitar, ukulele, and violin. Its Music Therapy program serves children through the elderly who have a variety of
“mental health needs and developmental and learning disabilities” through group, private, and adaptive piano lessons (Foundations Music School, 2018).

Parlando School of Musical Arts (2019) is a community music school based in Boulder, Colorado with the mission to provide “access to people of all ages and abilities, inspiring them to share in the love of music and the arts through education, community collaboration, and performance opportunity” (Parlando School of Musical Arts, 2019). Beginning in 2007, the center currently served nearly 700 students weekly through private and group lessons in piano, voice and acting, and instrument groups such as strings, brass, and woodwinds primarily at its main campus at the Dairy Arts Center. Parlando also has a satellite campus in North Boulder at the Boulder Country Day School. In addition to its semester student instrumentalist recitals and performances, the center produces a musical each semester and during the summer.

Founded in 1942, the Rocky Ridge Music Center (2018) originally was a summer music program in Estes Park that allowed a “serene place to commune with music and nature, and the close mentorship model of a master teacher to student” (Rocky Ridge Music Center, 2018). Nowadays, the organization aims to provide “transformative music education” with year-round private and group instruction in Boulder and Denver as well as its tradition of summer music programs in Estes Park (Rocky Ridge Music Center, 2018). At the urban centers, private instruction includes lessons for strings, woodwinds, keyboard, voice, and composition. Group classes include those for young children ages three months to four years that focus on music listening, singing and dancing, playing rhythm instruments, and developing “coordination, balance, attention, flexibility, focus, spatial awareness, emotional knowledge, and vocal precision” (Rocky Ridge Music Center, 2018). In Estes Park, the summer programs are geared towards youth, young professionals, and adults. Most of the youth and young professional
programs range between two to four weeks and give students the opportunities to participate in private lessons, chamber ensembles and orchestras, choirs, and performance classes while taking music coursework. The Adult seminar programs are focused on piano, chamber music, and American folk music and provide opportunities for private instruction, masterclasses, attending concerts and lectures.

The review of community music schools reveals similarities in target audiences. Each institution provides music education opportunities from preschool through high school-aged children in private and group settings. Each institution claims to be educating the whole person through music; however, the programming intensity ranges from music as social recreation to pre-professional artist development. From an initial glance, the CMA shares a similar value of educating the whole person through music education opportunities ranging from private and group lessons, community band and jazz ensembles, informal music jams, and music therapy.

**Festivals: Approaches and Concepts**

In addition to reviewing community music institutions and defining the approaches to the phenomenon, there is a need to define and review music festivals, since CMF-CMA serves both roles. The following will examine literature that broadly defines a festival and explores classical music festivals in Colorado.

Like the field of community music studies, the field of festival studies is rooted in interdisciplinary practice. The *Routledge Handbook of Festivals* (2019) collects scholarly essays on topics of festival research such as sustainability, management, marketing and strategic use, festival experience, festival types, cultural perspectives, and the future of festivals. In its
introduction, editor Judith Mair surveys the wide definitions of a festival and provides her own that attempts to cover all perspectives:

Perhaps an appropriate, if lengthy, definition of festivals might be: short term, recurring, publicly accessible events that usually celebrate and/or perform particular elements of culture that are important to the place in which they are held or the communities which hold them; that provide opportunities for recreation and entertainment; and that give rise to feelings of belonging and sharing (Routledge Handbook of Festivals, 2019, p. 5)

The UNESCO Festival Statistics: Key Concepts and Current Practices (2015) document draws its broad definition of festivals from the literature and describes festivals as “themed, public celebrations.” It typifies festivals through their characteristics of form (religious, cultural, sport, broadcast, virtual, fringe multicultural, hybrid), duration (start date and time, duration, season), and spatiality (site/venues, geo-location, country) (UNESCO, 2015, p. 9-10). Still other researchers have defined the festival as a “themed and inclusive community event or series of events which have been created as the result of an inclusive community planning process to celebrate the particular way of life of people and groups in the local community with emphasis on particular space and time” (Jepson & Clarke, 2013, p. 7). Michelle Duffy sees that the music festival in particular as a “long-lived” tradition with a “focus on specific music genres” that has now become: “an important live music strategy in the face of issues such as policy regulations in regard to noise, urban and regional development strategies, and the rapid increase in the development and democratisation of participation in the online world” (Duffy, 2019, p. 304).

Using the typology of form, duration, and spatiality as outlined by the UNESCO document, this study defines a festival as an event that publicly celebrates the Western classical music tradition during the summer months (June through August) through indoor and outdoor public venues.
Colorado Summer Classical Music Festivals: A Review

A review of summer classical music festivals compares and contrasts the CMF to its industry competitors. The review focuses on summer classical music festivals in Colorado that meet the following criteria: 1) provides classical music programming during the summer months (June-August) and the musicians that perform as orchestras, chamber ensembles, and or soloists are professionals from across the United States who are mostly not residents of the community where the festival is taking place, 2) offers an educational component that either occurs during the festival or year-round, 3) the festival and educational opportunities are not produced or run by a nonprofit organization and not a public or private institution of higher education. Stand-alone opera festivals were excluded because CMF does not offer operatic performances. Music festivals are not often listed in a formal directory; therefore, this study uses Romberg’s (2018) summer guide to classical music festivals in Colorado as a starting point.

Located in Aspen, Colorado, the Aspen Music Festival and School (2018) provides performances by chamber music ensembles, orchestras, opera, choirs, solo strings, piano, and voice. The educational opportunities during the festival include private instruction and ensemble coaching on a variety of instruments ranging from piano, orchestral instruments, and voice, to conducting and composition. In addition to the educational and performance opportunities during the summer festival months, Aspen provides after-school educational programming such as group classes in guitar, strings, and choir during the academic year. Additionally, the festival partners with local schools to perform concerts by professional musicians in the Roaring Fork Valley (Aspen Music Festival and School, 2018).

Bravo! Vail Music Festival (2018), located in Vail, Colorado, provides world-class performances by the Chamber Orchestra Vienna—Berlin, Dallas Symphony Orchestra, The
Philadelphia Orchestra, and the New York Philharmonic. Most of the performances are ticketed events held at the festival campus; however, they do offer some free performances in community venues. The festival offers limited educational opportunities. It allows only two, young adult pianists to work with the artists at the festival through coachings, performances, and masterclasses. Only one young adult chamber ensemble is given a similar opportunity. Additionally, the festival has an internship program to provide an on-site educational opportunity for students interested in arts administration (Bravo! Vail Music Festival, 2018).

Breckenridge Music Festival (2018) offers an array of orchestra, chamber ensemble, and solo classical music performances as well as non-classical performances of genres such as jazz, folk, soul, and country in Breckenridge, Colorado. The festival’s educational opportunities include outreach in schools during the academic year to provide all-school assembly performances, workshops, and artist residencies in the school. Additionally, the festival provides summer performances, workshops, and interactive presentations for families with young children (Breckenridge Music Festival, 2018).

Based in Fort Collins, Colorado, Off the Hook Arts’ (2018) mission is to provide “…free and low-cost music performance education for students in our community while cultivating a love of the performing arts through public concerts featuring world-class musicians and interdisciplinary collaborations among the arts, sciences, and humanities” (Off the Hook Arts, 2018). The organization provides a summer and winter festival whose programming is focused around a specific interdisciplinary topic (the 2018/19 summer and winter festival were themed around climate change and nature as musical inspiration). Orchestra, chamber ensembles, and solo musical performances are provided by local and national performing artists that are complemented by lectures and art exhibitions centered around a specific topic. The organization
offers year-round chamber music coachings for K-12 students as well as adults. Additionally, through a visiting artist, they provide educational outreach to schools with performance and workshops (Off the Hook Arts, 2018).

The Strings Music Festival (2018) in Steamboat Springs, Colorado, produces a summer program that includes varied genres “featuring classical musicians from the nation’s top orchestras and chart-topping popular contemporary artists” (Strings Music Festival, 2018). The festival brings K-12 students from Yampa Valley schools to the festival grounds, allowing students to interact with visiting artists through educational workshops and hear a live performance. The organization also provides concerts and educational workshops at schools 25 miles outside of the Steamboat Springs area. For adult education, they provide pre-concert talks to enhance the experience of the performance (Strings Music Festival, 2018).

Music in the Mountains Classical Music Festival (2018) is a festival based in Durango, Colorado that provides classical orchestra, chamber ensemble, and solo music performances in the summer and year-round educational support in the Durango community to K-12 students. The festival supports music education in the schools by providing scholarships for private lessons, free or reduced tickets to festival performances, and chances to experience a variety of instruments through an Instrument Discovery Day (Music in the Mountains Classical Music Festival, 2018).

The Crested Butte Music Festival’s (2018) mission is to “present an annual festival of diverse music, opera and dance performed by outstanding artists, to inspire a greater appreciation of these art forms, and to help develop the performers of tomorrow” (Crested Butte Music Festival, 2018) in Crested Butte, Colorado. Their educational programming, held during the
festival, includes a kids’ bluegrass camp, an opera studio and chorus, a chamber music intensive, jazz groups, and an orchestra fellowship program (Crested Butte Music Festival, 2018).

The Flatiron Chamber Music Festival (2018) is a relatively new summer festival based in Boulder, Colorado. Entering its second season during the summer of 2018, the organization provides a variety of concerts in Boulder area community venues and three-day chamber music intensive for K-12 student musicians that includes masterclasses, coachings, workshops, and final performance (Flatiron Chamber Music Festival, 2018).

The following music festivals provide small-scale concert programs and limited educational opportunities. Based in the mountain town of Telluride, Colorado, the Telluride Chamber Music Festival (2018) is a short music festival in August. They offer ticketed performances as well as a free concert in the park and a youth concert focused on developing music interest in children (Telluride Chamber Music Festival, 2018). The San Juan ChamberFest (2018) produced by the Ouray County Performing Arts Guild, produces a five-day chamber music concert series in community and private venues in the towns of Ouray, Ridgway, and Montrose Colorado. Although the arts guild provides educational opportunities, the music festival itself does not (San Juan ChamberFest, 2018). Through the Dercum Center, based in Summit County, Colorado, the Snake River Festival (2018) provides residents the opportunity to hear chamber music in a variety of community venues (Snake River Festival, 2018).

The review of music festivals in Colorado suggests several themes. All provide a series of performances, ranging from three days to seven weeks during the summer. Most offer educational opportunities for student musicians but vary in how they deliver their programming. Some provide professional training for student musicians, most of whom are pursuing formal music degrees. Other festivals work with local schools during the summer and school year. In
this way, the Colorado Music Festival differs from most other institutions because its educational opportunities are offered during the school year through its community music school, the Center for Musical Arts. The review of community music schools and summer music festivals in the state of Colorado provides a useful tool for comparison and contextualization in the case study analysis of the CMF-CMA. Not only does it demonstrate similarities with industry competitors, but it also points to the unique position of the CMF-CMA in the two industries.
Chapter III Methodology

Introduction

The purpose of this study is to describe and analyze how the CMF-CMA carry out their dual mission as a community music provider and a music festival. This research project attempts to answer this question using qualitative analysis and case study methodology. Qualitative analysis is defined as “a research method for the subjective interpretation of the content of text data through the systematic classification process of coding and identifying themes or patterns” (Hsieh & Shannon, 2005, p. 1278). A case study is defined as “an in-depth exploration of a bounded system based on extensive data collection” (Creswell, 2008, p. 476). Several types of case studies exist. Instrumental and collective case studies seek to study a particular issue through the use of one or multiple cases. On the other hand, an intrinsic case study model “has merit in and of itself” (Creswell, 2008, p. 476-77). Given the unusual nature of the CMF-CMA in terms of its product, the intrinsic case study model was used. The objective of using a case study as a methodology is to “develop an in-depth understanding of the case by collecting multiple forms of data” (p. 477). To that end, the data sources included stakeholder interviews, primary documents such as festival booklets and music education programming, observations of the organization’s website and social media, Internal Revenue Service (IRS) 990 Return of Organization Exempt from Income Tax financial statements from 2006 to 2017, and press publications. These documents were then used to construct a picture of the CMF-CMA, pre, and post-merger, as well as provide the backdrop for the SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis.
Methods of Data Collection

Selection of Interviewees

Interviews were conducted with board, staff, and faculty stakeholders. The Executive Director and Director of Education were contacted via email and the researcher requested individuals that they felt would be good research candidates. Bias may have been introduced into the selection of interviewees, because staff from the organization recommended particular individuals to be contacted and interviewed. As an outside researcher unfamiliar with the stakeholders, these staff were key to communicating the project objectives and inviting organization members to participate. As indicated by Table 1, nine out of the eleven interviewees are currently involved with the organization as board, staff, or school faculty. The two not currently involved include one of the founders and former board and staff member of the RMCMA. Ten of the eleven interviewees were given the same set of questions for the purpose of constructing the organizational timeline and analyzing its current status while the founder was given a different set of questions intended to develop the historical timeline of the RMCMA.
### Table 1: CMF-CMA Stakeholder Interviewees

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>Current Role</th>
<th>Starting Year</th>
<th>Initial Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stakeholder One</td>
<td>Staff</td>
<td>2016</td>
<td>CMF-CMA</td>
</tr>
<tr>
<td>Stakeholder Two</td>
<td>Board</td>
<td>1999</td>
<td>CMF</td>
</tr>
<tr>
<td>Stakeholder Three</td>
<td>Staff</td>
<td>1995</td>
<td>RMCMA</td>
</tr>
<tr>
<td>Stakeholder Four</td>
<td>Board and Staff</td>
<td>1995</td>
<td>RMCMA</td>
</tr>
<tr>
<td>Stakeholder Five</td>
<td>Staff and Faculty</td>
<td>2000</td>
<td>RMCMA</td>
</tr>
<tr>
<td>Stakeholder Six</td>
<td>Staff</td>
<td>N/A</td>
<td>RMCMA</td>
</tr>
<tr>
<td>Stakeholder Seven</td>
<td>Faculty</td>
<td>N/A</td>
<td>RMCMA</td>
</tr>
<tr>
<td>Stakeholder Eight</td>
<td>Staff</td>
<td>2004</td>
<td>RMCMA</td>
</tr>
<tr>
<td>Stakeholder Nine</td>
<td>Board</td>
<td>Early 2000s</td>
<td>CMF</td>
</tr>
<tr>
<td>Stakeholder Ten</td>
<td>Board</td>
<td>2000 or 2001</td>
<td>CMF</td>
</tr>
<tr>
<td>Stakeholder Eleven</td>
<td>Founder</td>
<td>1995</td>
<td>RMCMA</td>
</tr>
</tbody>
</table>

No attempt to contact the founder of the CMF, Giora Bernstein, was made. Such contact would have been difficult to obtain as he now resides in Vienna. Since his departure in 2000, his contribution would not have been necessary in order to create a brief timeline of the organization he helped to found. The timeline is mostly focused on the organizations since 2000.

### Interview Questions

Interview questions were developed through a deductive process with the intent to capture interviewee perspectives on several predetermined themes. Stakeholders were given Questions 1-3 ahead of time so that they may prepare statements, as the responses required reflection. They outline the personal relationship of the stakeholder with the organization, the
strengths, weaknesses, opportunities, and threats perceived by the stakeholder, and the degree of internal collaboration they notice within the organization. Questions 4-6 and any other follow-up were asked in order to provoke an “on-the-spot” response. These questions asked stakeholders to describe value words they have for the organization, to notice what audiences are served, and to envision what the future holds. A minimum of six prepared questions was asked with additional follow-up depending on the interviewee. A brief explanation for each question is provided here.

**Question 1: Describe your story with the CMF-CMA. For example, describe how you first became involved with the organization, how your role has changed, and what it looks like as of today?**

The purpose of this question was to solicit the stakeholder’s involvement at the organization in a narrative format from the time they started with the organization until the present day.

**Question 2: What do you see are the internal strengths and weaknesses as well as the external challenges and opportunities of the CMF-CMA organization?**

This question asked stakeholders to conduct a SWOT analysis without explicitly stating that such an analysis is being asked of them.

**Question 3: Based on your perspective and experience, how does CMF-CMA internally collaborate to serve its mission of providing music performance and education opportunities to the Boulder-Lafayette communities?**

This question attempted to ask how the organization worked together. Since CMF-CMA is the result of two merged organizations, the researcher was attempting to solicit a response about how
the two organizational cultures meshed. At times, it was an unfortunately tricky question for individuals to respond to and a rewording of the question would be undertaken if this study was repeated.

**Question 4: Describe CMF-CMA values in three words.**

This question asked stakeholders to provide value words for the organization. A cross-referencing of these words across stakeholders is intended to demonstrate any consistency in values in the organization.

**Question 5: Based on your perspective and experience, does CMF-CMA serve similar constituencies with its summer music festival and community music school, or do the programs serve different audiences?**

This question attempted to determine whether the CMF-CMA serves the same communities with their programs. Often, when stakeholders responded with the answer of ‘different’ audiences, the follow-up question was asked:

**Follow-Up Question 1: Is it okay that they are different?**

This follow-up attempted to gauge whether the stakeholder felt it was acceptable that the audiences were different.

**Question 6: Where do you see the organization in three years?**
This final unprepared question was asked to see how the organization might change in the near future. It attempts to solicit the ideas of opportunity that the stakeholders might have for the organization.

The questions for Stakeholder Eleven were developed with the intent to develop the historical timeline of the RMCMA, the events leading up to the merger, and organizational culture post-merger. All of the questions were given to the interviewee beforehand to facilitate a thorough reflection and response. The questions and a brief explanation are listed here.

**Describe the founding story of the RMCMA from the point of the organization’s conception to the end of its first operating year.**

This question attempted to set the stage of the RMCMA’s development as an initial idea through its first year of operating.

**What are three-value words that would have described RMCMA?**

While the response was not used in the value words analysis, it was asked in an attempt to see if there was any connection between the RMCMA’s value words and the current organization’s list.

**Describe the organization’s development and expansion prior to the merger.**

This question asked the interviewee to discuss the RMCMA during the 1996-2009 period.
Describe how the collaboration between RMCMA and CMF began and the relationship that you had with CMF staff.

This question sought to illustrate the steps taken and relationships built prior to the official merger of the organizations.

Describe the merger proposal and framework that was offered to RMCMA. How were stakeholders engaged with the merger process?

This question asked the stakeholder to outline the details of the official merger offer and proposed framework for a new organization, and to discuss how organization stakeholders were involved in the process.

Describe the organizational climate during the early years of the post-merger.

The intent of this question was to provide a glimpse into how the organizations began to integrate their workplace cultures.

Interview and Transcription Process

Interviews were conducted during the period of March through June of 2019. Many of them were on-site at the Center for Musical Arts in Lafayette, although a few of them were conducted in stakeholder homes and in the Howard Waltz Library at the College of Music at the University of Colorado Boulder. Interviews were recorded using a smartphone through the Trint app. This app transcribed the audio recording using Artificial Intelligence, and the transcriptions were edited by the researcher for clarity. The transcripts are found at the end of the document in Appendix A: Interview Transcripts. To provide a small degree of anonymity, the interviewee names were omitted and given placeholder names such as “Stakeholder One, Stakeholder Two.”
Other names mentioned in the transcript were not changed in order to maintain the clarity of the text.

Primary Documents

To aid in the development of the historical timeline, several primary documents such as festival booklets and music education programming, Internal Revenue Service (IRS) 990 Return of Organization Exempt from Income Tax financial statements, and press publications were collected. The 2017-2019 season booklets were obtained to make observations on concert programming, cross advertisement of education and performance programming, and organizational history. The music education brochure for the 2018-19 academic year was collected to establish baseline knowledge of the CMA’s various educational programs. Internal Revenue Service (IRS) 990 Return of Organization Exempt from Income Tax financial statements were used, providing crucial insight into the organization’s financial health by charting profits, net assets, government grants, contributions, ticket and tuition income, revenue and expenses, earned and unearned income, the average shares of earned and unearned income as well as expenses across the organization during the 2006-2017 period. Press publications from the Daily Camera were used to understand the organization from the public perspective during the 2000-2018 period.

Methods of Data Analysis

Introduction

To ensure a thorough evaluation, this study employed several methods of data analysis. In addition to the deductive process of the interview questions, an inductive process, or reading interviews from the “bottom-up,” was conducted. This means that the researcher read for themes
and subthemes that surfaced from the interviews and then were categorized. More specifically, each category of the SWOT analysis conducted in Question 2 was divided into several themes. Themes were summarized and conclusions made. If and when Stakeholders mentioned strengths, weaknesses, opportunities, or threats in other sections of the interview, these were recorded within the respective categories.

The SWOT Analysis

A SWOT Analysis was conducted based on data collected in the interviews as well as the primary documents. As mentioned previously, Question 2 implicitly asks Stakeholders to perform a SWOT analysis. At its core, the analysis is a general list of internal strengths and weaknesses as well as external opportunities and threats. Madsen (2016) writes that the SWOT analysis “is a framework for assessing a firm’s resources and capabilities (strengths and weaknesses) and external market situation (opportunities and threats)” (p. 1). In the *Oxford Handbook of Strategy: A Strategy Overview and Competitive Strategy*, Kay, McKiernan, & Faulkner (2006) discuss the SWOT analysis in the following terms:

The best and most familiar example of an organizing framework is SWOT analysis—the definition of the strengths, weaknesses, opportunities, and threats which the business faces. SWOT is simply a list. It conveys no information in itself, but it is a way of helping us to think about the information we already have (p. 43).

The SWOT analysis tradition appears to stem from the Harvard Business School during the second half of the 20th century and is a popular tool for managers to assess their organizations (Madsen, 2016). Since this is a common method of evaluation in organizations, it was determined that this was the best way to provide relevant and clear analysis to not only a community of scholars but members of the observed institution.
Evaluation of Methodology

Limitations

The limitations of this study leave the door open for further research and more rigorous qualitative and quantitative research. One of the most significant limitations was the selection process for stakeholder interviews. Since the researcher is not a member of the organization, interviewee selection relied on the judgement of the Executive and Education Directors. Since the interviewees are only a subset of the diverse stakeholders in the organization, they provide only one set of internal perspectives. However, this perspective is a needed first step in a lengthy process to strategically evaluate the organization’s role in the community. Nevertheless, the data illuminates important themes and subthemes. In future studies, these could be investigated using more rigorous methods.

In this research project, no attempt was made at engaging various populations, such as the school’s music students or families, nor the festival patrons, through focus groups or surveys. This is in part due to the limitations of time and the preliminary nature of the project. The research seeks to draw initial conclusions that will require further investigation and more targeted research questions.

One should note that this case study is an examination of an active, dynamic organization. The research spans a year from September 2018 to September 2019. During this period, the organization has already made changes that this paper does not incorporate. In particular, modifications and expansions have been made to its website platform, fundraising strategy, and educational programming. Therefore, it is important to remember that this research may not represent the organization at its current state.
Chapter IV Results

Introduction

The results of this investigation begin with the organizational history, which was collected through collateral materials and stakeholder interviews. The following brief history incorporates data from the CMF’s recital programming during the 2017-2019 seasons. This programming adds robust commentary to the results found in the Form 990 financial analysis. The financial analysis data set reveals trends in the organization’s viability over the last 10 years. Finally, the chapter concludes with a SWOT analysis and reflections on the themes and subthemes analyzed from the stakeholder interviews.

A Brief History of the CMF-CMA (1977-2019)

CMF Foundations (1977-2009)

Before the existence of the Colorado Music Festival and Center for Musical Arts (CMF-CMA), the Colorado Music Festival (CMF) and the Rocky Mountain Center for Musical Arts (RMCMA) flourished in the cities of Boulder and Lafayette, Colorado. Founded in 1976, the CMF began as an idea between the founder and conductor Giora Bernstein, and friend, Christopher Brauchli (Colorado Music Festival, 2017). While the first season was held at First Presbyterian Church in Boulder, it moved to the Chautauqua Auditorium in 1977 “because of its superb acoustics” (Pettem, 2007, 2017).

Over the next twenty-four seasons, Bernstein conducted the CMF until his retirement in 2000. During that period, the organization expanded its volunteer and fundraising capacity. The Friends of the Colorado Music Festival was established in 1981 to plan fundraising gala events
and fulfill the secretarial needs of the organization, such as mailing invitations and solicitation letters (Stakeholder Nine). Additionally, the Festival of Dinners, an annual fundraising series, was established in 1984 to connect festival patrons around a meal prepared by a local chef. In addition, the Young People’s Concert, established in 1987, was introduced to the festival programming and aimed at “giving children the experience of a live classical performance, while introducing parents to the planned CMF season” (Colorado Music Festival, 2017). As the needs of the organization changed, the fundraising and concert series evolved. In 2019, the CMF made significant changes. Instead of continuing with the series, the festival held an opening weekend gala to celebrate and reinvigorate the festival’s fundraising strategy. Like the fundraising series, the Young People’s Concert was rebranded for the 2019 season and is currently titled the Family Concert.

In the new millennium, the festival experienced a change in leadership. Following Bernstein’s retirement, conductor Michael Christie began his tenure in the summer of 2001, and Catherine Underhill became the executive director soon afterward during the 2002-03 season (Blomster, 2010; Kuta, 2011; Camera Staff Report, 2013a). Through their leadership, they introduced the World Music Series to the festival season in 2005, which occurred on Tuesday evenings, and created the Mini-Festival Series in 2008, which focuses on one theme or composer for a weekend. Both of these series have since undergone change depending on the organization’s focus and leadership. The last Mini-Festival Series and World Music Series occurred in 2017. Neither existed in 2018 or 2019.


The Rocky Mountain Center for Musical Arts (RMCMA) began as an idea between co-founders Kathy Kucsan and Peggy Bruns when they met during their graduate studies at the
University of Colorado. Bruns and Kucsan had a passion for making music education accessible and “wanted to create a place that would be welcoming to all people...A place for all kinds of musical abilities. The very beginning and young through the very experienced, through professionals and through oldest people in the community” (Kuta, 2011).

In 1995, the RMCMA was founded in Lafayette, Colorado. Bruns and Kucsan initially planned to operate it as a mobile organization without a space of their own, but a pair of angel donors purchased a building at 111 West Cannon Street in Lafayette, allowing the organization to use it rent free for the first two years (Stakeholder Eleven). According to Stakeholder Eleven, the decision to start a school in East Boulder County was strategic: “it was clear that the people that lived in Lafayette and Louisville [...] were tired of always having to go into Boulder and Denver for everything.” Following the inaugural fall semester in 1996, the center grew from 13 to 100 students by the spring of 1997. Stakeholder Eleven described the RMCMA’s initial educational offerings: “private lessons, small group lessons, early childhood classes, middle school honors orchestra [...], and a community chorus and band” in addition to affordable, public concerts. Many of the programs that began at the RMCMA still exist at the Center for Musical Arts.

By 2000, the RMCMA had outgrown its space, so it moved just around the corner to its current location of 200 East Baseline Road. In the expansion process, an additional angel donor purchased the building outright and the organization began a capital campaign in order to convert the building from a church to a music school. By the end of 2008, the center served nearly 800 students annually (Stakeholder Eleven). The growth not only reflected the quality of the program

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1East County is a loose term to describe parts of Boulder County, Colorado that are located east of the city of Boulder and south of Longmont, Colorado. In particular, these include communities in and around the U.S. Highway 287 corridor such as the towns of Lafayette, Louisville, parts of Erie and Superior.
offerings, but it also demonstrated the strong relationships with key stakeholders. Bruns explained that:

the model that worked for us was to just develop really solid authentic relationships with all these various constituencies. And we found that if we did that, the money followed. The financial piece worked if we were focusing on these relationships with students, faculty, staff, parents, audience members, donors, general community partners (Stakeholder Eleven).

The most compelling result from this successful model is the Heartstrings Program. To truly impact access to music education, Bruns and Kucsan championed this highly valuable program. Beginning in 2000, the program offered tuition assistance and a music instrument lending program to families in need. Continuing to this day, the program annually provides twenty-five thousand dollars in financial assistance to a varying range of fifteen to thirty percent of CMA students while supporting nearly two hundred students to have access to a rental instrument. The funds for the Heartstrings Program primarily come from contributed income (Colorado Music Festival and Center for Musical Arts, 2019).

The Merger Years (2009-2013)

Before the official merger in 2009, the RMCMA and CMF collaborated on educational programming during the summers at the festival. The collaboration model was built on the reputability of the RMCMA’s educational programming and its presence in East Boulder County, a region underrepresented at CMF concerts. If the festival engaged kids, it might also engage the parents (Stakeholder Eleven). At this point, the RMCMA helped coordinate the Young People’s Concert and produced a children’s workshop series called “Classically Kids,” which “were based upon the CMF artists, orchestra, and the repertoire for that particular season”
(Stakeholder Eleven). About a year before the official merger, Catherine Underhill, CMF executive director, approached RMCMA founders Peggy Bruns and Kathy Kucsan to propose formalizing the relationship between the two organizations based on the idea that “an amazing community organization” could be created (Stakeholder Eleven).

Based on the CMF’s presentation, the RMCMA founders and board agreed to the creation of a task force that would study the feasibility of the merger. The group, comprised of key staff and board members from both organizations, met weekly for a period of six months in 2009. The task force addressed issues of “mission, vision, culture, history, infrastructure, finance, and donor base” and each organization conducted surveys within the general and organization-specific communities (Stakeholder Eleven). In both organizations Stakeholder Ten reported there was “lots of debate, [and] lots of differences of opinion” over the merger idea. Some feared that the merger would make the organizations less focused on their missions and that financial resources might be spread unequally between the festival and school. On the RMCMA side, some feared that the merger “might turn out to be more of an acquisition rather than a merger and that their organization would essentially be subsumed by CMF” (Stakeholder Eleven). In the end, the taskforce recommended that the two organizations merge.

In February of 2009, the two organizations drafted a memorandum of understanding to outline the intentions of the merger, which essentially “were to increase the strength and vitality of both organizations,” since the CMF and RMCMA were “complementary, not competitive” organizations (Stakeholder Eleven). In September of 2009, both boards voted and approved the merger. A press release further demonstrates the goals and intentions of the merger:

The objective of this strategic alliance is to leverage the strengths of each organization, and enhance their ability to engage and inspire community members of all ages by
presenting the highest quality music performances and exceptional music education experiences[...]

The merged organization will share services, in areas such as insurance, physical maintenance contracts, marketing, accounting, finance and human resources administration. In addition, new programs will be introduced that take advantage of the strengths of both organizations, and deepen community outreach efforts.

(Colorado Music Festival, 2009).

The press release lists how the new organization would share in administrative duties, but does not elaborate on specific program blending. At the time, Underhill claimed, the “merger is designed to strengthen both organizations, and create efficiencies that will enable us to expand our programming and outreach,” and “be able to provide unique music education opportunities not currently available in Boulder County, and to do so affordably” (Colorado Music Festival, 2009). Bruns echoed Underhill’s optimism in the press release:

We feel that the synergy created by this combination will be very positive for everyone involved. The students will continue to have excellent instruction and be given expanded opportunities to connect with CMF’s world-class professional musicians. We are also excited to contemplate the addition of some possible new programs for the community (Colorado Music Festival, 2009).

The merger had specific advantages for the organizations. For the CMF, the merger increased its revenue “to ensure that we [the festival] continued to qualify for [Tier II of] SCFD$^2$ funding” (Stakeholder Two). For the RMCMA, the merger gave “more access to donations” which ultimately helped the school to remodel and expand (Stakeholder Four). It was thought

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$^2$ Science and Culture Facilities District (SCFD) is a regional tax program in the Denver Metro area that currently helps fund nearly 300 arts, culture and science organizations through grants. The program contains three funding tiers, which are determined based on revenue. Prior to the CMF-CMA merger, the SCFD recalibrated the revenue requirements to its funding tier system. For more information, please see the SCFD website: [https://scfd.org/](https://scfd.org/)
that both organizations would be “stronger financially” through the merger. (Stakeholder Seven). In theory, the merger would help the CMF in audience development by providing more access to “younger families” and give them “access to a building” through the RMCMA.\(^3\) On the other hand, the RMCMA would be given “improved and additional marketing” (Stakeholder Eight). Specifically for the CMF, the merger gave the festival “visibility in the East County,” while creating a direct connection to an educational institution that might be able to aid in audience development for the festival. Given its connections with an education institution, the merger would provide an edge in “more effective and successful fundraising” opportunities, and would provide the festival with more “financial bulk” (Stakeholder Ten). From Stakeholder Eleven’s perspective, the CMF benefited by having a “year-round presence and more visibility in East County,” “real estate” in the form of the RMCMA building, and the CMF would not have to be “concerned with their own educational component” since they were merging with an educational institution. On the other hand, the RMCMA gained “increased exposure and credibility as part of an older, more prominent organization.” For both of the organizations, Stakeholder Eleven expressed that there was an opportunity of creating “crossover programming opportunities” and that they could create “more impact together rather than apart.”

While the ideals and prospects of the merger seemed promising, interviews with stakeholders suggest that the merger had many challenges. It was meant to be the marriage of equals, but “CMF became the dominant player” (Stakeholder Two) during the early years. On the RMCMA side, some members viewed the CMF as the “elite of the two, the RMCMA more of a grassroots and welcoming” (Stakeholder Eleven). With the CMF, the focus to “provide music education for all levels for life” became more challenging (Stakeholder Seven). Even

\(^3\) Prior to the merger, the CMF rented office space out at the Chautauqua and did not have a year-round office space.
before the merger, Stakeholder Eight expressed that it was hard to envision how a functional merger would work. Once the two organizations merged, they combined staff and boards, which was “a bit overwhelming” and meant that the “first couple of years were very, very challenging” (Stakeholder Eight).

One of the major challenges to a successful merger were its original intentions. While initial discussions were “centered around what would the benefits be for both organizations,” it was later discovered that the “primary reason they [CMF] came to us [RMCMA] was to ensure that they could stay in Tier II SCFD” (Stakeholder Eleven). Stakeholder Three corroborated Stakeholder Eleven’s statement:

The merger was disingenuous. It was a strategy to stay in Tier II of SCFD funding. After the fact, long after the fact, we went back and found board meeting minutes that suggested finding a Tier III organization to merge with so that they could keep their threshold funding.

Additional members of the organization corroborate the financial intentions of the merger. Stakeholders Two and Ten admit that a primary reason for the merger was to maintain financial status within SCFD funding. They stop short of calling the merger disingenuous, but admit that it was “somewhat contentious” (Stakeholder Two). Because of this reality, “resentment on both sides” existed (Stakeholder Nine).

During the 2010-11 period of the merged organization, Stakeholder Eleven described the organization in a “general angst” with “internal issues” and a board that “was toxic” with a “very unsettled staff situation.” At the end of 2011, Stakeholder Eleven left the organization because of the differences in “core values and philosophy in terms of operations,” and the organizational “cultural chasm” between the CMF and CMA. Following Stakeholder Eleven’s departure, the
education coordinator was managed by several individuals during the 2011-2017 period until Kathy Kucsan returned to the organization in 2018 as the Education Director.

The Post-Merger Years (2013-2016)

Only two years following Bruns, Underhill left in 2013 to become the managing director of a Syracuse based symphony (Camera Staff Report, 2013a). At the same time, Michael Christie also ended his tenure with the CMF and took a position directing the Minnesota Opera (Hansen, 2012). In what appears to be an attempt to assuage the Boulder community of the organization’s future success, Underhill interviewed with the Daily Camera twelve days after the initial announcement of her departure, saying:

The organization as a whole is doing well…the festival’s revenues and audience numbers are both growing at a steady rate from year to year. I wouldn’t want to leave if the organization was on shaky ground, and I feel that right now I can do so without worries (Hansen, 2013).

However, the financial data provided in the nonprofit's Form 990 filed with the Internal Revenue Service (IRS), suggests a more murky reality. The organization’s net surplus of $565,820 in 2013 suggests a healthy stream of contributed income that balanced expenses. Contrary to Underhill’s statements, however, an analysis of the profits in the “Financial Trends” section demonstrates that it often went up and down from year to year, while expenses generally climbed higher for the organization during the last eight years of her tenure from 2006 to 2013.

The organization stayed in the public eye for the next three years, after the departure of Christie and Underhill, but not for the best of reasons. In December 2013, CMF-CMA announced a new executive director, David Pratt, of the Savannah Georgia Philharmonic. In his previous work, he was “credited with huge increases in earned [income, contributions, and
subscribers]” (Camera Staff Report, 2013b). It seems that it was the board’s hope that Pratt would also increase these figures for the CMF-CMA as well. However, in early 2014, news broke that Pratt backed out of the job offer and the organization resumed its search (Camera Staff, 2014a). Additionally, the search for a new conductor continued with finalists expected to “oversee two concerts in one festival week” in the upcoming 2014 season (Camera Staff, 2014a). This publicly conducted search resulted in the selection of Canadian conductor Jean-Marie Zeitouni in September 2014 (Hansen, 2017). In the meantime, Andrew Bradford was hired as executive director to begin in August of 2014 (Camera Staff, 2014b). In his former position, Bradford was credited with “balancing the [Illinois Philharmonic Orchestra’s] budget, creating an artistic vision to perform American music on every concert as well as the orchestra’s popular ‘presenting’ series and increasing the group’s audience base” (Camera Staff, 2014b). However, during the first nine months of 2014 when the CMF-CMA was without an Executive or Music Director, the budget was not balanced; the CMF-CMA lost over $180,000 that year. In 2015, a year into Bradford’s tenure, the organization suffered again with a loss of $117,000. In February 2016, Bradford resigned. According to a story in the Daily Camera, he left behind a legacy of “strong leadership” and “strong hires,” including Jean-Marie Zeitouni and administrative team members; however, some of the decisions led to “acrimonious departures” (Hansen, 2016).

The Age of McGuire, Oundjian, and Kucsan (2016-Present)

Within the course of two months from Bradford’s departure, the current executive director, Elizabeth McGuire, was hired and began her tenure in May 2016 (Camera Staff, 2016). Under her leadership, the total profits for 2016 and 2017 seasons returned to the black with postings of $45,707 and $366,912 respectively. It seems that with McGuire’s hire, the CMF-CMA found solid financial and executive leadership stability after a tumultuous few years. After the 2017

Summer Music Festival Programming

Since the founding of the CMF, the organization has sought to bring in rising-star guest artists to its audience. For example, in 1978, pianist Emmanuel Ax was a featured guest, while cellist Yo-Yo Ma first appeared with the orchestra in 1979. Violinist Hilary Hahn made her 1997 debut with CMF, and English soprano Jane Eaglen was invited in 2010. The tradition of featuring guest artists continues. For example, in 2017, pianists Olga Kern, Christopher O'Riley, and Pablo Ziegler as well as string trio, Time For Three, were invited guests. In 2018, violinist Vadim Gluzman opened the festival, while pianist Yefim Bronfman and mezzo-soprano Michelle DeYoung were also featured guests. In 2019, pianists Natasha Paremski, Jon Kimura Parker, and Gabriela Montero were featured throughout the festival alongside cellist Kian Soltani and violinists Robert McDuffie and Stefan Jackiw.

In the past three years, CMF programs have included 20 performances across a six-week period starting the last weekend of June and ending the first week of August. As seen in Figure 1, the concert date model has changed somewhat during the 2017-19 period. A shift towards concentrating concerts on Thursday, Friday, and Sunday and a reduction of performances on Saturday can be seen.
During the 2017-19 period, the genres of programmed repertoire fluctuated. In 2017, fourteen concertos, twenty-five symphonic works (with symphonic being defined as works primarily for orchestra and concertos with a soloist and orchestra), six works of chamber music, and ten solo piano works were programmed during the 40th anniversary season of the CMF. In 2018, concertos only decreased by one, but the number of symphonies and chamber music was expanded from twenty-five to thirty-seven and six to eleven respectively. Concerts with solo piano repertoire decreased in 2018 and 19. Interestingly, in 2019, the balance of genres programmed reflects that of 2017. This is perhaps because of the financial success of the 2017 season that 2019 was planned as such. The most programmed genre is the symphony followed by the concerto, and then chamber music. Piano solo seemed to be a one-season event and perhaps
less financially lucrative for the organization.

Within the 2017-19 period, European composers were repeatedly programmed. Figure 3 demonstrates composers who were programmed at least five times during the three-year period. Over the three years, Mozart was programmed the most at twelve times, followed by Beethoven eleven times, and Bernstein nine times. Bernstein was often programmed during 2018 because of the composer’s centennial. While the CMF does present new and underrepresented works and
composers, they are often programmed no more than two or three times a season. Although the current sample is only based on the 2017-19 seasons, the organization predominantly focuses on presenting music from late 18th- to early 20th-century European classical tradition.

Community Music School Programming

Much of the educational programming of CMF-CMA happens at the CMA. However, the festival offers a few free pre-concert talks an hour before the performance. The educational programming offered at the CMA is the typical model for a community music school: private instrumental and voice lessons, group lessons, and general music classes. The CMA offers general music courses for newborns up to teenagers such as Music Together (ages 0-5), Dalcroze Eurhythmics (ages 4-12), Vocalise! (ages 5-8) and Social Skills Music Jam (ages 7-15). For older teenagers and adults, the programming includes Adult Dalcroze Eurhythmics, Hammered Dulcimer, Broadway Boomers, Jazz Ensemble, Jazz Combos, Jazz for Singers, Community Band, and Ukulele Social Club. In addition to its educational programming, the CMA offers a few music-based community-building projects such as a free music movie night for students, families, and the general public. During Spring 2019, the movies were Amadeus (1984) and Waiting for Guffman (1996). The CMA also includes an open mic session every semester where students, faculty, and community members may perform in an informal setting. Finally, the TGIF Social Music Jam creates opportunities for special needs populations to express themselves through music and dance one Friday a month.
Financial Trends

As mentioned in the “A Brief History of the CMF-CMA” section, one of the reasons for the merger was to increase “financial bulk” for the CMF festival and strengthen both organizations financially (Stakeholder Ten). An analysis of the data available on filed the Form 990s, or “Return of Organization Exempt from Income Tax” expresses a few metrics such as profits, net assets, government grants, contributions, ticket and tuition income, revenue and expenses, earned and unearned income, the average share of earned and unearned income as well as expenses across the organization from 2006-2017. In all cases, financial data from 2006-2008 is representative of the CMF only. Figure 4 begins the discussion with a profit analysis.

During the 2006-2017 period, the organization saw eight out of twelve years with a profit loss. Profits spiked in 2013, while they plummeted in 2014. Nevertheless, the organization has
seen an upward trend in profits since a loss of $180,288 in 2014. Therefore, the merger with CMA does not appear to have made the organization immune to profit loss, just less often in the red beginning in 2009. After 2009, profits occurred in 2011, 2013, 2016, and 2017 with only minor losses occurred in 2010 and 2012. 2014 and 2015 saw the largest losses since the merger.

Nevertheless, net assets steadily increased after the merger. Net assets measure an organization’s assets versus their liabilities. The assets often include cash on hand, savings, pledges and grants received, land, buildings, and publicly traded securities. These may either be unrestricted, temporarily restricted, or permanently restricted assets. Cash and savings are typical examples of unrestricted assets that the organization can use freely throughout the year, while pledges and grants are often temporarily restricted funds, which are meant for specific projects of the organization. Permanently restricted assets are often securities and endowments, meaning that an organization can not access them easily. The liabilities included payable accounts and accrued expenses, which are often used to pay the organization’s day-to-day expenses. It also includes long-term liabilities such as loan repayments and mortgages. A growth in net worth (assets minus liabilities) generally indicates a financially healthy institution (Ganti, 2019). As Figure 5 indicates, the net worth of the combined organization has increased since the merger.

Figure 5: CMF-CMA Ending Net Assets (Funds Balance) Reported Amounts in 990 Part I, Line 19, 21 (2006-07) and Part I, Line 22, Column A & B (2008-2017)
In addition to net worth increase, government grants, predominantly from SCFD, have also increased since the merger. In particular, they doubled from 2009 to 2017 as seen in Figure 6. A year after the official merger, the organization saw an increase of $71,317 in 2010. This was the largest increase in funding during the 2006-2017 period. While government funding generally trended upwards during the 2006-2017 period, non-government contributions, such as individual gifts and corporate sponsorships, have seen several shifts. In Figure 7, contributions peaked at over one million dollars in 2009, 2013, and 2017. In 2009 and 2013, several large contributions gave the organization a head start in their fundraising goals. These figures are reported in Schedule B, or “Schedule of Contributors,” as part of the organization’s Form 990. As a part of federal tax regulation, nonprofit organizations are required to disclose the number of contributions made over $5,000.

However, they are not required to disclose the name or address of the donor. In 2009, a single contribution of $585,000 was recorded, which accounts for nearly half of the contributed funds.
during that year. In 2013, a similar case also happened when an individual donated $505,000. In 2017, the number of major contributions over $5,000 was more than previous years, but the highest contribution was $250,400, which was about half the amount seen in previous contribution peaks. While the periods of 2010-2012 and 2014-2016 depict lulls in contributions, it may suggest that the CMF-CMA wanted to ensure that the fundraising pipeline did not suffer from donor fatigue. The 2017 increase reflects the CMF’s 40th anniversary capital campaign.

Figure 7: CMF-CMA Contributions (individual, corporate) Reported Amounts in 990 Part I, Line 1b (2006-07) and Part VIII, Line 1f (2008-2017)

While contributions fluctuated, the CMA’s tuition remained rather stable throughout the period post-merger. In Figure 8, tuition increased four out of the eight years. Often, tuition fluctuated less than income from ticket sales. From one year to the next, ticket sales varied on an average of 14.24% (an average of $64,132 per year) positively or negatively. In comparison, tuition dollars on average varied only 4.86% (an average $19,019 per year) during the period.
In comparison, the overall revenue and expenses have mirrored each other and have not seen significant variation before or after the merger. If the intention of the merger was to increase overall revenue without incurring additional expenses, the data suggest that was not the case.

Despite the added earned income from the school’s tuition, the CMF-CMA still heavily relies on unearned income to support its mission. Following below, Figures 10 and 11 demonstrate the varying income streams and the average percentage share of revenue from each stream for the period 2006-2017. An average of 55% of CMF-CMA’s income comes from unearned revenue.
while only 40% comes from program revenue (concert tickets and tuition). During the 2010-17 period, ticket sales accounted for about 54% of earned income while tuition accounted for 46% on average. Only 5% comes from direct fundraising events and is not represented on the graph.
Value Words

Stakeholders were asked to state three words that may represent the values of the CMF-CMA. Excellence was the most common value word. It was mentioned a total of four times; it was the first word twice, the second word once, and the third word once. Figure 12 shows how often a word was mentioned and in which sequence (first, second, or third). No word was consistently mentioned by at least half of the stakeholders. A discussion of these words and their frequency is found in the “Value Words” section of Chapter V.

Figure 12: Value Words, Total Times and Sequence (First, Second and Third)

CMF-CMA Constituencies

The stakeholders were asked if the organization now serves similar constituencies through the festival and community music school. All of the stakeholders initially reported that the school and festival serve different audiences. Some encouraged methods of blending such as discounted ticket sales for CMA students and families (Stakeholder Two), and creating high

56
quality festival and educational programming and then encouraging students or festival goers to attend or enroll (Stakeholder Five). However, others have concluded that the audiences are different, and have accepted that reality. Stakeholder Seven suggests that the organization tried to blend the festival and music community communities, but doesn’t see the two coming together. Likewise, Stakeholder Eight states that “as much as we would like to think that it serves the same audiences, I don’t think that’s really true” (Stakeholder Eight). Stakeholder Nine admits that the festival and school “definitely serve different audiences...I think people are starting to finally realize that and deal with that. There was just this beautiful dream that it was all the same people...and it wasn’t...so different audiences” (Stakeholder Nine). Other Stakeholders are determined to see the festival and school more blended. For example, Stakeholder Three suggests that “there is no reason that the CMF audience needs to be mostly in their 70s” and is currently working on a bus project that would take individuals up to the festival. Stakeholder One framed the educational programming at the festival as being underneath the wing of the CMA and posits that now “there’s a lot more overlap...we have hundreds of people coming to pre-concert lectures and masterclasses” (Stakeholder One).

SWOT Analysis

Strengths

As part of the interview, stakeholders were asked to indicate the strengths of the organization. In total, stakeholders provided a total of forty strengths with many overlaps. From that sum, fifteen sub-themes were identified as a part of four distinct themes of strengths. As Table 2 demonstrates, the first three strength themes are staff, programming, and organizational assets, while the fourth is a set of intangible strengths that speak to organizational culture.
<table>
<thead>
<tr>
<th>Subtheme</th>
<th>Word/Phrase</th>
<th>Stakeholder</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communication</td>
<td>Good synergy in the admin staff</td>
<td>Staff</td>
</tr>
<tr>
<td>Communication</td>
<td>The staff works together really well</td>
<td>Staff</td>
</tr>
<tr>
<td>Education Director</td>
<td>Kathy Kucsan as education director</td>
<td>Staff</td>
</tr>
<tr>
<td>Executive Director</td>
<td>Skilled and grounded executive director</td>
<td>Board</td>
</tr>
<tr>
<td>Executive Director</td>
<td>Staff Leadership-ED is very good</td>
<td>Staff</td>
</tr>
<tr>
<td>Faculty</td>
<td>Faculty is very strong</td>
<td>Staff</td>
</tr>
<tr>
<td>Faculty</td>
<td>The people-both faculty and the staff</td>
<td>Staff</td>
</tr>
<tr>
<td>General</td>
<td>CMF-CMA staff</td>
<td>Staff</td>
</tr>
<tr>
<td>General</td>
<td>Merged organizations allow for enhanced staff</td>
<td>Staff</td>
</tr>
<tr>
<td>General</td>
<td>Staffing is very good</td>
<td>Staff</td>
</tr>
<tr>
<td>General</td>
<td>The people-both faculty and the staff</td>
<td>Staff</td>
</tr>
<tr>
<td>General</td>
<td>Management is better and trying to make things go</td>
<td>Staff</td>
</tr>
<tr>
<td>Music Director</td>
<td>Peter Oundjian</td>
<td>Board</td>
</tr>
<tr>
<td>Music Director</td>
<td>Peter Oundjian</td>
<td>Board</td>
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**Theme 1: Staff**

**Subtheme Analysis**

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<tr>
<td>Specific Staff</td>
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</tr>
<tr>
<td>Faculty</td>
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<tr>
<td>General Strengths</td>
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<td>Stakeholder: Staff</td>
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<tr>
<td>Stakeholder: Board</td>
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## Theme 2: Programming

### Subtheme, Word/Phrase, Stakeholder

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<tr>
<th>Subtheme</th>
<th>Word/Phrase</th>
<th>Stakeholder</th>
</tr>
</thead>
<tbody>
<tr>
<td>Heartstrings</td>
<td>CMA-instrument bank</td>
<td>Board</td>
</tr>
<tr>
<td>Heartstrings</td>
<td>CMA-instrument lending program</td>
<td>Board</td>
</tr>
<tr>
<td>Heartstrings</td>
<td>CMA-scholarship programs</td>
<td>Board</td>
</tr>
<tr>
<td>Heartstrings</td>
<td>Access that we offer to the community</td>
<td>Staff</td>
</tr>
<tr>
<td>Heartstrings</td>
<td>Heartstrings program</td>
<td>Staff</td>
</tr>
<tr>
<td>Festival Quality</td>
<td>Ability to attract rising stars</td>
<td>Board</td>
</tr>
<tr>
<td>Festival Quality</td>
<td>World-class orchestra</td>
<td>Board</td>
</tr>
<tr>
<td>Festival Quality</td>
<td>Festival quality</td>
<td>Staff</td>
</tr>
<tr>
<td>Festival Quality</td>
<td>Orchestra in the summer is spectacular</td>
<td>Staff</td>
</tr>
<tr>
<td>Festival Quality</td>
<td>Performance and education are excellent quality</td>
<td>Board</td>
</tr>
<tr>
<td>Education Quality</td>
<td>Performance and education are excellent quality</td>
<td>Board</td>
</tr>
<tr>
<td>Education Quality</td>
<td>Wide range of music education opportunities for community</td>
<td>Board</td>
</tr>
</tbody>
</table>

### Theme 2: Programming

#### Subtheme Analysis

<table>
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<tbody>
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<tr>
<td>Heartstrings</td>
<td>5</td>
</tr>
<tr>
<td>Festival Quality</td>
<td>5</td>
</tr>
<tr>
<td>Education Quality</td>
<td>2</td>
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<tr>
<td>Stakeholder: Staff</td>
<td>4</td>
</tr>
<tr>
<td>Stakeholder: Board</td>
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</table>

## Theme 3: Organizational Assets

### Subtheme, Word/Phrase, Stakeholder

<table>
<thead>
<tr>
<th>Subtheme</th>
<th>Word/Phrase</th>
<th>Stakeholder</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial</td>
<td>CMA-well funded</td>
<td>Board</td>
</tr>
</tbody>
</table>
Financial | Considerable more access to donations | Board
Performance Venue | Chautauqua is a wonderful spot | Board
Performance Venue | Chautauqua-sound quality | Board
Physical | CMA building | Board

### Theme 3: Assets

#### Subtheme Analysis

<table>
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<tr>
<th>Analysis Tool</th>
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</thead>
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<td>Performance Venue</td>
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<td>Financial</td>
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<td>Physical</td>
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<td>Stakeholder: Staff</td>
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<tr>
<td>Stakeholder: Board</td>
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### Theme 4: Intangible

#### Subtheme, Word/Phrase, Stakeholder

<table>
<thead>
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<th>Subtheme</th>
<th>Word/Phrase</th>
<th>Stakeholder</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community</td>
<td>A real sense of community</td>
<td>Staff</td>
</tr>
<tr>
<td>Community</td>
<td>People love CMA; they have found a community here</td>
<td>Staff</td>
</tr>
<tr>
<td>Community</td>
<td>Great deal of community support</td>
<td>Board</td>
</tr>
<tr>
<td>Dedication</td>
<td>Dedicated people</td>
<td>Board</td>
</tr>
<tr>
<td>Dedication</td>
<td>CMA-dedicated faculty</td>
<td>Board</td>
</tr>
<tr>
<td>Dedication</td>
<td>Small cadre of dedicated people in each part of the organization</td>
<td>Board</td>
</tr>
<tr>
<td>Generosity</td>
<td>Generosity on behalf of faculty/orchestra members</td>
<td>Staff</td>
</tr>
<tr>
<td>Heart</td>
<td>CMA-wonderful heart</td>
<td>Board</td>
</tr>
<tr>
<td>Heart</td>
<td>Everyone has heart</td>
<td>Staff</td>
</tr>
</tbody>
</table>

### Theme 4: Intangible

#### Subtheme Analysis
<table>
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<th>Analysis Tool</th>
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<td>Number of entries</td>
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<tr>
<td>Community</td>
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</tr>
<tr>
<td>Dedication</td>
<td>3</td>
</tr>
<tr>
<td>Generosity</td>
<td>1</td>
</tr>
<tr>
<td>Heart</td>
<td>2</td>
</tr>
<tr>
<td>Stakeholder: Staff</td>
<td>4</td>
</tr>
<tr>
<td>Stakeholder: Board</td>
<td>5</td>
</tr>
</tbody>
</table>

Although six of the eleven stakeholders are staff or faculty members, they were often the group of stakeholders who mentioned that the staff’s communication and skill set is a strength of the organization. Staff and board members spoke highly of the current Executive, Education, and Music Directors. This may be explained by the relative stability the individuals who occupy these roles have given the organization. As mentioned previously, the past six years have seen frequent staff turnover in high level positions: the executive and music directors Underhill and Christie leaving in 2013, and often short lived executive and music directors during the 2014-2016 period. In 2016, Elizabeth McGuire became executive director, while Peter Oundjian was hired as the new music director in 2018. Additionally, former RMCMA founder Kathy Kucsan returned as education director in 2018. Because of these hires and their ability to work well together, the organization has finally found stability in high-level positions. With the current leadership and their unique skill sets, many stakeholders agree that the staff is a strength to the CMF-CMA organization.

In addition to the staff, stakeholders see the organization’s programming as a strength. More specifically, board and staff members mentioned the Heartstrings program, which lends instruments to students and also provides scholarships to under resourced families in the
community. Stakeholders enthusiastically expressed the summer music festival’s overall quality as being a strength to the organization. Some mentioned the quality of musicians’ artistry as what makes the festival performances strong, and helps attract high profile guest artists. Finally, the community music school’s educational quality and breadth of programming was seen as a strength, although this was expressed to a lesser degree than the other sub-themes.

The third theme is that of the organization’s physical and financial assets. Only board members mentioned these assets as strengths of the organization. The Chautauqua Auditorium is also considered an asset because of its acoustics.

The fourth theme is related to the organizational culture. Staff and board stakeholders about equally mentioned various characteristics such as community, dedication, generosity, and heart as strengths to organization. In comparison to the staff, board members more often mentioned the dedication of individuals within the organization. Staff more often spoke of the community that exists, particularly at the CMA. Given previous statements made by stakeholders about the incompatibility of the organizational cultures, it appears that attitudes have changed since the early days of the merger and stakeholders are starting to view each other as equal partners in carrying out the organization’s mission.
## Weaknesses

### Table 3: SWOT Analysis, Weakness Themes and Subthemes with Analysis

#### Theme 1: Capacity

<table>
<thead>
<tr>
<th>Subtheme</th>
<th>Word/Phrase</th>
<th>Stakeholder</th>
</tr>
</thead>
<tbody>
<tr>
<td>Board</td>
<td>The board-doesn't understand how to be a board</td>
<td>Staff</td>
</tr>
<tr>
<td>Board</td>
<td>The board-lack of following term limits</td>
<td>Staff</td>
</tr>
<tr>
<td>Physical</td>
<td>Lack of physical capacity at CMA</td>
<td>Staff</td>
</tr>
<tr>
<td>Physical</td>
<td>Physical capacity</td>
<td>Staff</td>
</tr>
<tr>
<td>Staff</td>
<td>Very small staff</td>
<td>Board</td>
</tr>
<tr>
<td>Staff</td>
<td>Lack of staff capacity</td>
<td>Staff</td>
</tr>
<tr>
<td>Staff</td>
<td>Staff capacity</td>
<td>Staff</td>
</tr>
<tr>
<td>Staff</td>
<td>Scope of work imbalance between CMF-CMA</td>
<td>Staff</td>
</tr>
<tr>
<td>Staff</td>
<td>Inability to afford a new position</td>
<td>Staff</td>
</tr>
<tr>
<td>Staff</td>
<td>Lack of staff capacity</td>
<td>Staff</td>
</tr>
<tr>
<td>Staff/Board</td>
<td>Too small group of dedicated people</td>
<td>Board</td>
</tr>
<tr>
<td>Turnover</td>
<td>Faculty comes and go</td>
<td>Staff</td>
</tr>
<tr>
<td>Turnover</td>
<td>Lots of staff turnover in the past few years</td>
<td>Staff</td>
</tr>
</tbody>
</table>

#### Theme 1: Capacity

### Subtheme Analysis

<table>
<thead>
<tr>
<th>Analysis Tool</th>
<th>Total</th>
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</thead>
<tbody>
<tr>
<td>Number of entries</td>
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<td>Board</td>
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</tr>
<tr>
<td>Physical</td>
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</tr>
<tr>
<td>Staff</td>
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</tr>
<tr>
<td>Staff/Board</td>
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<td>Turnover</td>
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</tr>
<tr>
<td>Subtheme</td>
<td>Word/Phrase</td>
</tr>
<tr>
<td>----------</td>
<td>-------------</td>
</tr>
<tr>
<td>Brand</td>
<td>No established brand</td>
</tr>
<tr>
<td>Brand</td>
<td>Name confusion-geography related</td>
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<tr>
<td>Brand</td>
<td>Brand image of both CMF and CMA</td>
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<tr>
<td>Marketing</td>
<td>Marketing the CMF-CMA</td>
</tr>
<tr>
<td>Marketing</td>
<td>Program marketing is a challenge</td>
</tr>
<tr>
<td>Marketing</td>
<td>Get the marketing out in East County/Boulder</td>
</tr>
<tr>
<td>Merger</td>
<td>Resentment on both sides after merger</td>
</tr>
<tr>
<td>Merger</td>
<td>Tendency to automatically split it up again</td>
</tr>
<tr>
<td>Merger</td>
<td>Trying to find out where to accept that it's not two separate things and it's not really one whole thing</td>
</tr>
<tr>
<td>Presence</td>
<td>Lack a year round presence</td>
</tr>
<tr>
<td>Presence</td>
<td>Continuing to evolve with the needs of the community</td>
</tr>
<tr>
<td>Presence</td>
<td>Hard to maintain presence in Boulder community after festival</td>
</tr>
<tr>
<td>Presence</td>
<td>Hard to maintain festival presence outside of Boulder</td>
</tr>
</tbody>
</table>

### Theme 2: Organizational Identity

#### Subtheme Analysis

<table>
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<tr>
<th>Analysis Tool</th>
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<td>Number of entries</td>
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<td>Brand</td>
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<td>Merger</td>
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<td>Presence</td>
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<td>Marketing</td>
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In comparison to strengths, stakeholders mentioned organizational weaknesses only thirty-three times. In Table 2, the weaknesses centered around three main themes of capacity, organizational identity, and stakeholder involvement across the organization. Issues in capacity included the size of the staff, which many claimed is too small to complete the work of the
organization effectively. Several also mentioned that the board does not function as efficiently as they could and that term limits are not followed. Additionally, several stakeholders stated that turnover among staff and faculty had been an issue in the early years of the merger. In contrast to the opinion of stakeholders who were board members, staff stakeholders mentioned that staff capacity was a weakness to the organization. This was mentioned eleven times compared to only two mentions among the board members.

There was a consensus among stakeholders that another critical area of weakness was organizational identity. Four main sub-theme areas demonstrate this collective opinion: organizational branding and marketing, maintaining a presence in the Boulder community after the festival, and identity post-merger. From an observation of the festival and educational program booklets as well as social media accounts, the CMF-CMA are often branded and marketed separately. While concert programs from 2017-19 include a small section on the educational opportunities at the CMA, the relationship between the festival and the community music school is not clear. Similarly, in the CMA educational brochures, the festival is only briefly mentioned and not tied in as an educational component of the school. Furthermore, the festival and school hosts individual social media accounts on Facebook, which suggests that the organization’s intention is to maintain separate online content to its respective audiences. Finally, the festival and school continue to manage separate websites, https://coloradomusicfestival.org and https://centerformusicalarts.org, which are only joined through an introductory portal, https://comusic.org. In an age when an online presence is a necessary component to developing an organizational presence within one’s community, the separation of communications and branding actively prevent CMF-FMA from establishing a cohesive, distinctive identity. As a result, the organization will struggle to respond to its community’s needs.
The active separation of the online presence of the CMF-CMA might be related to the weakness in stakeholder involvement across the organization. Board and staff members have admitted that it is a struggle to get the CMA families and students to attend festival concerts in the summer. One wonders if this might change if the CMA families had a voice in determining the festival’s program as they may be able to help create programming that will excite and encourage other CMA constituents to attend the festival. Board members have suggested that festival patrons may not care much about the CMA, and some have not even set foot inside the school building. One barrier to cross program participation may be the lack of social media messaging that curates a cohesive online presence of the organization. Additional research is needed in order to determine whether this plays a part in the lack of involvement. On the other hand, it may be the geographical distance between the school and festival that affects involvement. Chautauqua (where the CMF is hosted) and the Center for Musical Arts are about 10.5 miles apart. By vehicle only, a trip may take about 25-30 minutes during non-peak travel hours along Baseline Road according to a search on Google Maps. It may be that such a trip is not worth the effort of stakeholders who live in Boulder or Lafayette. It is also possible that with a saturated performing arts market, that there are other opportunities to attend closer to home. In any case, additional research is needed to determine if and how geography and a saturated market might factor in stakeholder participation in the CMF-CMA programming.

Opportunities

<table>
<thead>
<tr>
<th>Theme 1: Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subtheme, Word/Phrase, Stakeholder</td>
</tr>
<tr>
<td>Subtheme</td>
</tr>
</tbody>
</table>

Table 4: SWOT Analysis, Opportunity Theme and Subthemes with Analysis
<table>
<thead>
<tr>
<th>Audience Development</th>
<th>Audience growth</th>
<th>Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blended Programming</td>
<td>Blended programming between CMA and orchestra</td>
<td>Staff</td>
</tr>
<tr>
<td>Blended Programming</td>
<td>Blended in terms of education and performance</td>
<td>Staff</td>
</tr>
<tr>
<td>Blended Programming</td>
<td>Collaboration between CMF-CMA through educational programming</td>
<td>Staff</td>
</tr>
<tr>
<td>Community Engagement</td>
<td>Outreach in East County where the population is growing</td>
<td>Board</td>
</tr>
<tr>
<td>Community Engagement</td>
<td>Students from CMA go to Frasier or go to Balfour</td>
<td>Board</td>
</tr>
<tr>
<td>Community Engagement</td>
<td>Collaboration with Boulder Valley School District</td>
<td>Staff</td>
</tr>
<tr>
<td>General</td>
<td>East County is growing</td>
<td>Staff</td>
</tr>
<tr>
<td>General</td>
<td>If the board were more functional, this would be a dynamic kick-ass organization</td>
<td>Staff</td>
</tr>
<tr>
<td>General</td>
<td>Growth—more people playing/listening music</td>
<td>Board</td>
</tr>
<tr>
<td>General</td>
<td>Chance to grow into something even more exciting</td>
<td>Board</td>
</tr>
<tr>
<td>General</td>
<td>Neighbors finding friendship</td>
<td>Board</td>
</tr>
<tr>
<td>Physical Capacity</td>
<td>Additional space</td>
<td>Staff</td>
</tr>
<tr>
<td>Physical Capacity</td>
<td>CMA has additional campus</td>
<td>Staff</td>
</tr>
<tr>
<td>Presence</td>
<td>Expand CMA reach; regional presence</td>
<td>Staff</td>
</tr>
<tr>
<td>Presence</td>
<td>Increase festival awareness</td>
<td>Staff</td>
</tr>
<tr>
<td>Presence</td>
<td>Internationally known in three years</td>
<td>Staff</td>
</tr>
<tr>
<td>Presence</td>
<td>Developing awareness in the community</td>
<td>Staff</td>
</tr>
<tr>
<td>Programming</td>
<td>Space capacity at CMA—during the day</td>
<td>Board</td>
</tr>
<tr>
<td>Programming</td>
<td>Robust summer camp-CMA</td>
<td>Board</td>
</tr>
<tr>
<td>Programming</td>
<td>Concerts before/after the regular season to maintain presence</td>
<td>Board</td>
</tr>
<tr>
<td>Programming</td>
<td>Accreditation from the National Guild for Community Arts Education</td>
<td>Staff</td>
</tr>
<tr>
<td>Student Enrollment</td>
<td>Capacity to grow student enrollment</td>
<td>Board</td>
</tr>
<tr>
<td>Student Enrollment</td>
<td>Getting more home-school populations</td>
<td>Staff</td>
</tr>
</tbody>
</table>

**Theme 1: Growth**
As Table 4 demonstrates, in comparison to internal strengths and weaknesses, stakeholders reported less external opportunities for the CMF-CMA organization. The twenty-four entries have been divided among eight sub-themes of one overarching theme of growth. Many stakeholders see an opportunity for growth in their organization in terms of blended programming between the festival and music school, community engagement, physical capacity, organizational presence, festival and music school program expansion, student enrollment, and audience development. It seems that these opportunities were not capitalized on during the early years of the merger, and any attempts were not able to make any progress due to high-level staff changes during the 2011-2016 period.

| Subtheme Analysis |
|-------------------|---|
| **Analysis Tool** | **Total** |
| Number of entries | 24 |
| Audience Development | 1 |
| Blended Programming | 3 |
| Community Engagement | 3 |
| General | 5 |
| Physical Capacity | 2 |
| Presence | 4 |
| Programming | 4 |
| Student Enrollment | 2 |
| Stakeholder: Staff | 15 |
| Stakeholder: Board | 9 |

As Table 4 demonstrates, in comparison to internal strengths and weaknesses, stakeholders reported less external opportunities for the CMF-CMA organization. The twenty-four entries have been divided among eight sub-themes of one overarching theme of growth. Many stakeholders see an opportunity for growth in their organization in terms of blended programming between the festival and music school, community engagement, physical capacity, organizational presence, festival and music school program expansion, student enrollment, and audience development. It seems that these opportunities were not capitalized on during the early years of the merger, and any attempts were not able to make any progress due to high-level staff changes during the 2011-2016 period.
## Threats

### Table 5: SWOT Analysis, Threats Themes and Subthemes with Analysis

#### Theme 1: Competition

<table>
<thead>
<tr>
<th>Subtheme</th>
<th>Word/Phrase</th>
<th>Stakeholder</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chautauqua</td>
<td>Chautauqua-rental expense increase</td>
<td>Board</td>
</tr>
<tr>
<td>Chautauqua</td>
<td>Ticketing is done through Chautauqua</td>
<td>Board</td>
</tr>
<tr>
<td>General</td>
<td>Too much classical music around here</td>
<td>Board</td>
</tr>
<tr>
<td>General</td>
<td>Lack of media coverage</td>
<td>Board</td>
</tr>
<tr>
<td>Music Festivals</td>
<td>Mountain towns</td>
<td>Board</td>
</tr>
<tr>
<td>Music Festivals</td>
<td>Every mountain town has a summer program</td>
<td>Board</td>
</tr>
<tr>
<td>Music Schools</td>
<td>Other schools</td>
<td>Staff</td>
</tr>
<tr>
<td>Music Schools</td>
<td>Other schools of music</td>
<td>Staff</td>
</tr>
<tr>
<td>Outdoor Activities</td>
<td>Other activities (outdoors)</td>
<td>Board</td>
</tr>
</tbody>
</table>

#### Subtheme Analysis

<table>
<thead>
<tr>
<th>Analysis Tool</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of entries</td>
<td>9</td>
</tr>
<tr>
<td>Chautauqua</td>
<td>2</td>
</tr>
<tr>
<td>General</td>
<td>2</td>
</tr>
<tr>
<td>Music Festivals</td>
<td>2</td>
</tr>
<tr>
<td>Outdoor Activities</td>
<td>1</td>
</tr>
<tr>
<td>Music Schools</td>
<td>2</td>
</tr>
<tr>
<td>Stakeholder: Staff</td>
<td>2</td>
</tr>
<tr>
<td>Stakeholder: Board</td>
<td>7</td>
</tr>
</tbody>
</table>

#### Theme 2: Market Trends
<table>
<thead>
<tr>
<th>Subtheme</th>
<th>Word/Phrase</th>
<th>Stakeholder</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demographic Changes</td>
<td>Shrinking audience</td>
<td>Board</td>
</tr>
<tr>
<td>Demographic Changes</td>
<td>Finding a younger audience</td>
<td>Board</td>
</tr>
<tr>
<td>Demographic Changes</td>
<td>Too few lovers of classical music or people who strongly believe in the role of music education</td>
<td>Board</td>
</tr>
</tbody>
</table>

**Theme 2: Market Trends**

**Subtheme Analysis**

<table>
<thead>
<tr>
<th>Analysis Tool</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of entries</td>
<td>3</td>
</tr>
<tr>
<td>Demographic Changes</td>
<td>3</td>
</tr>
<tr>
<td>Stakeholder: Staff</td>
<td>0</td>
</tr>
<tr>
<td>Stakeholder: Board</td>
<td>3</td>
</tr>
</tbody>
</table>

**Theme 3: Physical**

**Subtheme, Word/Phrase, Stakeholder**

<table>
<thead>
<tr>
<th>Subtheme</th>
<th>Word/Phrase</th>
<th>Stakeholder</th>
</tr>
</thead>
<tbody>
<tr>
<td>Geography</td>
<td>Physically challenging to get to Chautauqua</td>
<td>Board</td>
</tr>
<tr>
<td>Geography</td>
<td>Physically so separated from the festival</td>
<td>Staff</td>
</tr>
</tbody>
</table>

**Theme 3: Physical**

**Subtheme Analysis**

<table>
<thead>
<tr>
<th>Analysis Tool</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of entries</td>
<td>2</td>
</tr>
<tr>
<td>Geography</td>
<td>2</td>
</tr>
<tr>
<td>Stakeholder: Staff</td>
<td>1</td>
</tr>
<tr>
<td>Stakeholder: Board</td>
<td>1</td>
</tr>
</tbody>
</table>

As Table 5 suggests, stakeholders only mentioned fourteen entries when asked about the external threats to the organization. Because this was the fourth part of a lengthy question,
interviewees may have lost focus and provided less commentary on this aspect. Nevertheless, their responses were divided into seven sub-themes under three themes: competition, market trends, and physical threats to the organization. Competition from other music festivals and schools located in the mountains and the front range was mentioned equally between board and staff members. Increasing costs for renting the Chautauqua venue, as well as the venue’s control of ticketing, were also mentioned as threats to the organization. Market trends generated by an aging audience in classical music participation were also mentioned. Most of these threats were brought up by board members. Finally, the physical location of the Chautauqua venue was mentioned. Patrons find it difficult to drive, park, and walk up to the hall given the steep terrain. Furthermore, the physical separation between the school building in Lafayette and the music festival is a notable threat.
Chapter V Discussion

Introduction

The results collected to create a brief timeline of the CMF-CMA indicate a rich, yet complicated, history of two well-established organizations in their respective communities. While the merger occurred ten years ago, it seems that the organization has achieved some of the original merger’s intentions. For reference, the goals of the merger are restated below:

The objective of this strategic alliance is to leverage the strengths of each organization, and enhance their ability to engage and inspire community members of all ages by presenting the highest quality music performances and exceptional music education experiences[...] The merged organization will share services, in areas such as insurance, physical maintenance contracts, marketing, accounting, finance and human resources administration. In addition, new programs will be introduced that take advantage of the strengths of both organizations, and deepen community outreach efforts.

(Colorado Music Festival, 2009).

A discussion of recommendations follows. This researcher hopes to provide an outside, relatively unbiased perspective, based on the SWOT Analysis, to improve the organization’s dual role as a music presenter and education center. These potential improvements aspire to bring out the best of the CMF-CMA’s abilities in accordance with the merger’s original intentions. It is acknowledged that the CMF-CMA leadership may already be aware of some of its shortcomings and that some of these suggestions may be in motion.
Financial Perspectives

From a fiscal perspective, the merger has proven somewhat fruitful for both organizations. Reported net assets have increased by about one million dollars from 2008 to 2017. The increase in government grant money and the acquisition of the RMCMA building due to the merger has helped to grow the net worth of the organization. Contributions, in general, have been at the highest level for the organization since the merger. However, challenges still remain. Expenses remain high, and, depending on the year, the revenue has not outpaced expenses. If the merger was intended to reduce costs, it does not appear to have been successful. Additional research is needed to explore exactly how the organization may cut administrative and other expenses without affecting program quality.

Like many performing arts organizations, CMF-CMA relies too much on unearned income. According to a National Endowment for the Arts (2012) analysis of how arts are funded in the United States:

- roughly 45 percent of their funding, in aggregate, comes from government and private sector contributions. The remaining 55 percent of these organizations’ total revenue can be assigned to earned income (ticket sales, subscriptions, etc.) and interest from investments, such as an endowment.

While the merger gave both organizations more access to and diversity of contributed income sources through individual giving, corporate sponsorships, and government grants, the organization should continue to look at strategies to increase its reliance on tuition and ticket sales. At an average of 54.9% unearned and 39.9% earned income during the 2006-2017 period, the organization should work to balance these percentages and ultimately grow earned income to account for more than half of the total revenue. Ittelson (2017) argues that “having multiple
revenue sources is best” but also states that a high self-sufficiency ratio indicates that the organization “generates enough revenue on its own through program services” and therefore can reduce financial risk (p. 45). Ideally, for an organization that has a relatively reliable stream of income via tuition as well as annual ticket sales, the portion of earned income ought to be near 60% while unearned income should rest near 40% of the total revenue. Given the organization's fluctuation around individual giving, this shift would significantly enhance fiscal viability. More research should be conducted to evaluate dynamic pricing and other methods for ticket sales and tuition without compromising the integrity of the programming.

Some uncertainty is in part due to the recent tax code changes and donor demographics. With the Tax Cuts and Jobs Act of 2017 passed by the U.S. Congress, the standard deduction for single and joint filers was increased from $6,530 to $12,000 and $12,700 to $24,000 respectively (Department of the Treasury, 2018). This means that donors who itemize their taxes are now required to make at least $12,000 or $24,000 worth of deductions. This change may affect how much donors give annually as they may no longer be able to take advantage of the previous tax benefits. While it is not yet clear how much the change in tax law will affect charitable giving, CMF-CMA should be prepared in the event that individually giving declines. Another pressing concern is the aging donor population. The CMF-CMA must continue to develop creative approaches to engaging younger, prospective donors. The field of philanthropy often discusses negative trends in millennial giving based on financial insecurity, instability, and a general disinterest in giving. To achieve long-term sustainability of resources, the organization should move away from the current reliance on contributed income. An emphasis on earned income through strategies such as the growth of student enrollment and subsequent tuition through
CMA, programming or day-use rental partners at the school building, and increasing the CMF’s ticket sale revenue, the organization can explore a more vibrant future.

Organizational Identity

Because the SWOT Analysis revealed that many stakeholders feel that a weakness of the organization is the lack of identity, the merger creates fresh challenges in the marketing and branding of the organization. Despite the identity crisis caused by the merger, the CMF-CMA is difficult to describe and define because it is inherently unique. Few entities, if any, of its kind currently exist. However, this unique identity is the key to its success! It is not just a music festival, but neither is it only a community music school. The CMF-CMA is both a music festival and community music school. Every stakeholder of the CMF-CMA needs to realize this and speak of the organization in this way. Each stakeholder can be an ambassador for the organization to the outside world and in the general community. It is imperative that all stakeholders, especially the board members, are highly knowledgeable and equipped to be representatives for the community music school and festival programming. They must be prepared to articulate the acute specific, diverse needs of these two entities and advocate equitably for both. One program cannot take priority of focus to the detriment of the other: no matter the historical prestige, the ability to generate income, or a stakeholder’s previous allegiance to either CMF or RMCMA. The organization ought to be seen as a new entity that demands equal, intentional focus.

One swift remediation would be addressing the organization’s online presence. It continues to serve as a visual reinforcement that the CMF-CMA is separate and not equal. Three separate websites compartmentalize the organization and confuse the reader. The words tell the
official story, but the images and articles speak of two programs in separate worlds or rather, communities. The Home Page of the organization, https://www.comusic.org/ is the least inviting of all the pages, and it is the first page that appears when one searches for the CMF-CMA on Google. While it acts as a portal to two different websites, which stand well on their own, it shows no connection through imagery, messaging, or consistent branding. For example, the main logo of the Colorado Music Festival and Center for Musical Arts is only found in its full form on the home page rather than on all of the pages of the CMF or CMA websites. Introducing the logo across all of the associate web pages would make a tremendous difference. A focused marketing and branding analysis may help the organization identify other ways to blend its identity and create a unified web presence.

In addition to the separate websites, the organization’s social media platform is not cohesive. For example, the CMF-CMA have separate Facebook profiles for the school and the festival. By the very existence of separate pages, it is even less apparent that the CMF-CMA is one institution. While the two pages may be able to curate specific content for the organization’s specific constituencies, a unified page that supports both festival and school content would help blend the organization’s identity online and perhaps create cross-programmatic interest amongst the school and festival communities. Additionally, the option of signing up for a joint e-newsletter that highlights the school as well as the festival, rather than the currently separate email subscriptions might aide in the development of and address the weakness in stakeholder cross-programmatic involvement. For example, if festival ticket sales were advertised to the entire CMF-CMA community through one single Facebook page or e-newsletter, it may help to garner CMA students and families to be interested in attending a concert. In another way, if adult, group music classes were advertised to both communities through one Facebook page or e-
newsletter, it may pique the interest of a festival goer, whether they’ve been attending the festival for a long time or recently discovered it. A unified Facebook page and e-newsletter might also help ease staff capacity and work time. Formal marketing research by a consultant should be conducted to confirm and provide an implementation plan for these suggestions. Digital media unification and strategic audience segmentation will reach more individuals and tell the CMF-CMA story best.

Organizational Culture

Related to a discussion of organizational identity is a discussion on its internal culture. The discussions from the stakeholders indicate that the CMF and RMCMA were not prepared for the integration of the two organizational cultures. Dysfunction during the early years of the merger seemed to have ultimately led to the tumultuous period of leadership between 2011 and 2016. Of the senior staff, only Kathy Kucsan has returned to the organization since the merger. Elizabeth McGuire and Peter Oundjian played no part in the merger. Whether this dysfunction affected lower level staff at the festival or school is not known and further research is needed to investigate this aspect. However, one could hypothesize that a certain degree of that dysfunctional leadership was felt by those who served at lower levels, and it may have affected the quality of services available to the community.

An important step forward by the organization is to acknowledge the complexity of the merger and begin the process of reconciliation. This should occur at the professional and personal level, as many people were hurt by this transition, and it may include an acknowledgment between stakeholders of the ways that they have injured each other on an emotional or cognitive level through individual actions and inaction. Moving forward, this may
require formal mediation. Stakeholders must realize that their purpose as servants to the mission of the organization is to work together towards a renewed, reinvigorated vision for the CMF-CMA as one institution.

**Value Words**

While a blended online presence is important to building a more cohesive organizational identity, having a set of words that represent the values of the organization across the spectrum of stakeholders at the school and festival is crucial. From the Value Words analysis, it is clear that stakeholders have not established a consistent set of words that describe the organization. While the specificity of the words is not entirely important, it would be useful for the CMF-CMA to participate in a visioning process to more accurately describe the organization as a whole across the festival and school. This can be a process of renewal and set the standard for programmatic activity and inter-stakeholder relations.

**Programming**

In regards to programmatic activity, the CMF-CMA has not publicly articulated any current plans to create new, or build upon, existing programs that “take advantage of the strengths of both organizations, and deepen community outreach efforts” (Colorado Music Festival, 2009). While the Heartstrings program has been able to grow due to more access to donations through the CMF, further research is needed to determine how new programs could be supported. To harness the festival and school’s strengths, further research is also needed to determine the current and potential community impact. One idea that could enhance the organization’s blended programming is to host the CMA students and performing ensembles at
the CMF for one weekend. For example, several high level ensembles such as the jazz combos, the adult vocal groups, and student soloists could perform. A potential program could feature alternating works between the festival orchestra and these ensembles with potential testimonies from performers about the CMA’s impact on their lives. Not only does this type of blended program highlight the CMA at the CMF and celebrate the education community in an active way, it enhances the festival’s season and ought to draw in a wider audience from the school community and the general public. This might also provide cost savings to the festival for a high-cost guest artist, or it may provide greater resources to leverage negotiation of a high-cost guest artist at a different point in the festival. If the CMF-CMA spends one festival weekend highlighting the achievements of its own students, it will bring the students to the festival through active participation. Other activities could be planned alongside this event to make the festival more inviting to students and families so that in the long run, it might attract and grow a youthful festival audience.

While it is important to search for ways to create intentional, blended programming and unify stakeholder interest across the two entities, it is also helpful to acknowledge the differences. Complete integration of programming may not be possible and that such difference is not a negative attribute. It is crucial to maintain the organization’s identity as the Colorado Music Festival and Center for Musical Arts, but its functionality can be dualistic.
Chapter VI Conclusion

The purpose of this study was to describe and analyze how the CMF-CMA carries out its dual mission as a community music provider and a music festival. As demonstrated by the literature review, the Colorado Music Festival and Center for Musical Arts is one-of-a-kind and provides opportunities for live, professional performance and community music education. The CMF-CMA creates high-quality opportunities in performance and education; however, it is a challenge to balance the organization’s commitment in these specific programs while creating blended programming.

The 2009 merger plays a central role in the organization’s balancing act. Because of it, the organization has benefited financially as a whole. With more access to grants and individual giving, the organization is in a better position to solicit contributed income for operating costs and innovative, blended programming. Nevertheless, the organization must search for ways to increase its earned income and create sustainable revenue streams if contributed income or government funding declines due to changes in tax law or economic fluctuation. The festival must increase ticket sales among target populations that have the potential to become regular subscribers. The CMA must increase enrollment in both private and group classes and explore building rentals during non-peak hours to generate reliable, consistent income.

Even though the merger was a success from a financial point of view, the historical timeline indicates that the merger was a challenge to realize. The merger did not lead to a coherent organizational identity and culture. Reconciling organizational culture was a significant challenge as perceptions were divergent. Former RMCMA stakeholders believed that CMF prioritized the merger as a financial means to an end rather than as a way to enhance professional performance and music education opportunities in Boulder County. Management failed to
steward the transition, which led to high turnover in the three years following the merger. Nearly a decade later, however, with new leadership, the organization can focus on growing the collaborative culture amongst festival and education stakeholders and their common mission to serve the public. To that end, the organization should consider creating a new set of common and shared values that not only helps with the healing of old wounds but reinvigorates the momentum of serving the community through music education and performance.

Because of the merger, the organization’s identity is in flux, so communications may hinder its mission until brand unification is resolved. In the digital age, a unified online presence must promote the festival and education content through a single website, social media platform, and an integrated e-newsletter. With these changes in place, the community will understand and value that the CMF-CMA is one organization and not two separate entities. Leadership, staff, and board members must become zealous ambassadors for this renewed, equal entity. While this case study has illuminated some of the ways the CMF-CMA serves the community through performance and education and how they may build on these practices, further research is needed to understand how individuals outside the staff and board perceive the organization. Due to time constraints, this research project was unable to incorporate the perspectives of the orchestra musicians, festival patrons, community music school faculty, students and families, including adult participants. Additional research focused on these perspectives would give the organization a better understanding of what best serves their current constituencies and how they may improve their services.
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Appendix A Interview Transcripts

Stakeholder One

Cody Goetz [00:00:02] Thank you so much for coming to speak with me about your involvement at CMF-CMA. Describe your story with the CMF-CMA. For example, describe how you first became involved with the organization, and how your role has changed and what it looks like as of today.

Stakeholder One [00:00:22] So I became involved with the organization when I noticed that there was a vacancy. The position was posted in a few places, and I was looking for a job because I had moved to the area. So I applied and went through the process and obviously was offered and accepted the job started in early May 2016 and have been the executive director since that point. Since I began, I would say the job itself hasn't changed.

Cody Goetz [00:01:15] Could you give a general description of what you do on a daily basis.

Stakeholder One [00:01:26] My job description would say that I am responsible for all of the financial and program activities of the organization. In reality that really means that I'm managing the organization, the personnel, and finances in coordination with the board of directors, especially the financial part because that falls under their jurisdiction as well. So there are quite a few staff members that report directly to me, and the majority of my work managing is relative to making sure that they're all communicating with each other, on the same page about what our goals are, kind of keeping track of where we are against the goals, making sure that all of the major systems are in place, and for us, especially because of the wave of the festival every year it's critically important that we get ahead of a timeline. The Center for Musical Arts is this year round thing and there certainly are waves that occur before each semester and before our
CMA fundraiser in the fall. But the festival is fast and furious that it really starts to ramp up in as early as November and through obviously June starts. So I'm trying to manage that overlap and make sure that there's enough capacity. Oftentimes I step in to assist with the capacity if there's a gap for some reason and that can be because we are a little understaffed, still, although we've made some strides. I'm responsible for hiring, and hopefully not, but could fire employees as necessary, as well as employment policy. All of the faculty are employees and the musicians are primarily employees as well so you can see that adds up to quite a few people. So it's a big job. My background is in orchestra management, which is one of the things that I focus on and it's very likely why I'm in the position. For the last 10 years I've been the executive director of a regional orchestra prior to coming here so I do take on quite a lot of the festival operations.

**Cody Goetz [00:04:42]** Out of curiosity, are the faculty and orchestral musicians, or are they independent contractors?

**Stakeholder One [00:04:48]** They are W-2 employees for the most part.

**Cody Goetz [00:04:52]** And everyone's at-will employees? There's no unions at all involved with the orchestra?

**Stakeholder One [00:05:06]** No, the orchestra does have a orchestra committee. We are continuing to work on creating some policy that mirrors a little bit the union structure for protections for both sides but not within the union structure.

**Cody Goetz [00:05:44]** What do you see are the internal strengths and weaknesses as well as the external challenges and opportunities of the CMF-CMA organization?

**Stakeholder One [00:05:57]** Well the staff is a strength because they really care and they're diligent, hard working people. They are all very intelligent. They always give above and beyond what they're asked to do. So it's really a very special group of people. The programs are of
enormous strength. The quality and depth of the programs across the board. Certainly the festival quality. I think it's unmatched in the region and perhaps in larger portion of the western part of the United States. I mean in the fact that we have the music director that we now have speaks to the attractiveness of that quality, and it's something we're continuing to develop. As a whole, there is an enormous strength with the Center for Music Arts. I think it's the depth of programs that we offer and the access that we offer to the community. That's really very impressive. It has always been very impressive to me. Our heart strings program is an example of access. We try to make sure that anyone that comes through the door is able to participate, regardless of their financial situation. And I would say another amazing strength both the festival musicians and the faculty both groups of individuals are surprisingly willing to step in and help and kind of what they want to be part of it. There's a certain draw to it, which I think is above and beyond what I've experienced in other orchestras and other music schools that there's really like a sense of community.

**Cody Goetz** [00:08:15] Can you give a specific example of where festival musicians and faculty are stepping in and willing to help?

**Stakeholder One** [00:08:28] Absolutely. With faculty we have Kathy. We have faculty meetings and so just on a very basic level a lot of the faculty members have been pitching ideas about how to generate more enthusiasm and more students at CMA. Several of them have offered to teach a free lesson every month as their give back to the heart strings program and I think that's amazing because you know these are not necessarily people who can afford a lot. . . music isn't the most lucrative career. So I think it's incredibly generous. With the festival, I am struck by the existence of the orchestra committee. We talked about it not being in a union, but the orchestra kind of galvanized and voted upon their own orchestra committee and those individuals work
very hard to help me develop the policies and it's all volunteer. In fact I'm talking to the chair of the orchestra committee later today, and he's already put in several hours in the past month; he lives and works in another state in a full time orchestra has a complete another life elsewhere. The festival is just a six week stint, but they still really give very freely of their time when they think that it can help and they really care about making it successful.

Cody Goetz [00:10:25] Can we circle back to some of the internal weaknesses as well as the external challenges and opportunities of the organization.

Stakeholder One [00:10:34] Sure. I think an internal weakness is that we lack a little capacity. We have made some strides, but we are still a little bit understaffed relative to the job at hand. When I look at even just festivals without schools that are similar in scope, I see that they have larger staff. I would say that I'm the only full-time orchestra related staff. We do have a lot of seasonal employees, and part-time people. But we could use at least one more full time employee who's dedicated to the festival. The challenge is trying to afford that position, and where to put them physically, because we're a bit at max capacity here. A challenge is also trying to determine whether or not we're better off just adding on to the hours of seasonal and part-time people, versus hiring a full-time because there are so many waves of work. And so there would be several months where there wouldn't be a lot to do relative to just the festival and there's not necessarily a part-time need at CMA that would balance out those months. For example, I'm talking about someone who would take over some operations management. If we were to make it as another seasonal position, who would be qualified enough. So I have to think about solutions around that. And I think I have one. But to just continue to add on to those who were already doing it. . . It's a challenge because the jobs that are needed don't always line up time wise or skill set wise across the organization. And so that kind of speaks to another maybe an external
challenge is that we're physically so separated from the festival. I think it's a struggle for people to remember us and Boulder between festival seasons. We're so intense and short-lived that it's a challenge anyway, but to add to that, our offices are in Lafayette and we're housed in a community music school and have a very different function the rest of the year. It's hard to maintain a presence in the Boulder community, and likewise very hard to maintain any sort of festival presence outside of Boulder.

**Cody Goetz [00:14:00]** What would be one of the external opportunities or opportunities for growth?

**Stakeholder One [00:14:11]** A pipe dream would be to have some sort of additional space. Maybe try to expand the reach of the Center for Musical Arts and maybe have more of a regional presence overall. And with the festival, I think it's that the opportunity is not so much in expanding the number of programs because we may be capped off, but just continuing to increase people's awareness of it by continuing to deliver the highest possible quality. Continuing to drive quality and for our marketing to reflect that shift.

**Cody Goetz [00:17:21]** Moving on to the third question, based on your perspective and experience how does CMF-CMA internally collaborate to serve its mission of providing music performance and education opportunities to the Boulder-Lafayette communities?

**Stakeholder One [00:17:37]** Well that's tricky. I think that the main connection points are the fact that the two exist together allows us to have an enhanced staff. It reduces overhead expenses so that you do have more capacity than you would otherwise have. For example, you have you know a couple deep in development and marketing whereas one or the other would definitely just have a portion of that, if anything. Where it applies to programming, actually that's something that we're working to develop even more because I think we found that the
organization has been functioning rather separately, not entirely, but we think that there's opportunity to expand there for sure and part of the reason that it hadn't maybe hadn't been done in the past decade since the merger is because of capacity. There has been a lot of staff turnover so some of it just completely natural based on you know expiring terms, people moving on. . . Now that we have an education director back. . . I kind of see that as it's almost like the Education Department that major symphony orchestras wish they had. Right? So when you look at what orchestras are doing so far as education, we do all of that plus much, much more. And on the flip side, when you look at what music schools are doing at that ability to provide access to high level performance is something that we do better than anyone think I have ever seen. I don't know that it exists to this extent. The only thing that I would say might be better elsewhere is that it's more consistent throughout the year. But our ability to do all of those things to a degree that others probably would struggle with, is exceptional.

**Cody Goetz [00:20:07]** I have to say, through some of my literature review, which consisted of reviewing different community music schools and music festivals in the area, and really what I found is that the festivals have educational components but they don't do it like this organization does, which is why I think this is such a fascinating, unique organization to be able to do this.

**Stakeholder One [00:20:39]** I think your impression is the same as mine in the sense of like all right. This is amazing. There's so much potential; some of it has been flushed out; a lot of it hasn't a lot of it was and it went away; and now it's just this trying to figure out in today's world what that looks like and that's what all nonprofit employees do every day. It's always changing so you could build on something but that doesn't mean it looks like it did. So yeah I think it's this exceptional opportunity. Having Kathy in the position is incredible because she's a former orchestral oboe player and she understands where there can be synergy as do I. So having the
right people in the right positions helps tremendously. We work really well together and our
development team is always there. They're always looking for opportunities to support new
initiatives. We have a really strong staff communication now that helps us. A lot of times we're
guided by funding. . . the trends in funding or what funding might be available is what kind of
makes us think "Oh we can do that.” And sometimes it's like "we should do this because it's the
right thing to do" and then the funding comes to us. So it's a combination of those things at all
times and always has been. The plans kind of unfold based on who you have and what their
strengths are and what the physical space limitations and timing. . . for example, we're talking
about bussing children out to the festival this summer from this area wanting to make our youth
concert more diverse for example with the audience more diverse. Those are the types of things
that we can start getting into. We have such a diverse population here at CMA, and it's not
reflected in our CMF audience. We know this because we've reviewed the demographics.
Although, it's always it's hard to say what motivates what. It's just that you have a lot of
information and you look at the things that you would like, you kind of dream big, and then you
make steps towards that. But other synergies. . . I think one of the things we would like to do is
we're starting to emphasize more education at the festival. We've taken our pre-concert lectures
and that's now being managed by our education department. Whereas I think it used to be a very
separate thing. Now it's part of a bigger educational picture. We have classes that are designed
around festival programs. We're starting a new program called "symposiums," bringing Jan
Swofford, a Beethoven and Charles Ives scholar this summer and so that I very much consider a
function of our Center for Musical Arts. But going back to a challenge is that that's not
necessarily the same audience that's coming through the doors of this building every day. So how
do we do it? Do we try to bring the Center for Musical Arts people into the festival fold. Yes, we
definitely want them to attend. We definitely incentivize their attendance. We give them special like family rates and such and we were trying to figure out even aiding in transportation. Do we try to bring the festival audiences into the education fold. Absolutely we do it through programs that are centered around festival programming at first. We think that's been the foot in the door for them. Then through some sort of newsletters and other organizational information they become aware of the fact that this school is here and that they can participate in other ways. But that part is challenging. The marketing of it is very challenging because when people are looking to attend the concert they just want concert information, and what we have tended to do in the past is to show them everything we are. It's like going on a first date and telling someone your life story. You know, it's probably not the best method right? It's a little too much too soon. And so what's tricky is trying to figure out what's a good strategy to try to make sure that there's awareness for people that come in through CMA make sure they're aware of the festival and vice versa because they're they can be very different populations.

Cody Goetz [00:26:55] Describe CMF-CMA values in three words.

Stakeholder One [00:26:58] Oh my gosh. . . alright, well I'm going to steal some three words that we already have because I think it rings true:


Cody Goetz [00:27:15] You kind of spoke about this already in a response to one of the previous questions, but based on your perspective and experience, does CMF-CMA serve similar constituencies with its summer music festival and community music school or do the program serve different audiences?

Stakeholder One [00:27:34] They seem to serve different audiences for the most part. There is some overlap but it's small. I don't have an exact percentage right now because I think it changes
every day, but I think that probably also depends on how you're carving it out. Now that we're considering all of our festival education, a relatively new approach even though it seems kind of obvious, I think, is to consider all of the festival education to be under the Center for Musical Arts domain and under the staff domain for the education director, which immediately changes...now there's a lot more overlap now we have hundreds of people coming to pre-concert lectures and masterclasses.

**Cody Goetz** [00:28:39] Where do you see the organization in three years?

**Stakeholder One** [00:28:46] I see that the festival has become more internationally known in three years. I think the baby step, well it's not a baby step, it's a giant leap that we've made in that direction was hiring Peter Oundjian, our music director. I think the Center for Musical Arts in three years has another campus somewhere in the region so there's just expansion. I think we're on the verge of expansion for both.

**Cody Goetz** [00:29:32] Thank you so much.
Stakeholder Two

Cody Goetz [00:00:12] Thank you for your time and for interviewing with me. I'm really excited to hear about your perspectives on CMF-CMA. The first question I'd like you to answer is describe your story with CMF-CMA. Describe how you first became involved with the organization how your role has changed and what it looks like as of today.

Stakeholder Two [00:00:34] Well it has certainly changed. My professional background is legal and real estate development, and I moved part-time to Boulder in 1993 and then full-time in 1996. I joined the board of the Colorado Music Festival in 1999, and I became president of the organization in 2006 and served a typical term of two years. I came across the music festival via the newcomers organization in Boulder, which I joined when we first moved here. And like many others who've come here from other parts of the world, I was stunned to find the quality of the orchestra and I'll talk more about that later on. I was responsible in part for the merger with the Center for Musical Arts and that was somewhat contentious with some people and some board members arguing that it didn't bring anything to the music festival, although the music festival could bring significant opportunities to the Center for Musical Arts. I would say that I and several of my colleagues muscled the merger through, and I think it has been a financial success for both organizations. It has been a difficult marriage, but there's never been any thought of a divorce. [Later], I'll talk some more about the threats and weaknesses and opportunities arising from the merger, but it is still true that we benefited, particularly on the festival side, by increasing our overall revenue to ensure that we continue to qualify for SCFD [Science and Cultural Facilities District]. And we have continued to be Tier 2 in SCFD in part because of the growth in revenue from both organizations. I'm still active today. Two years ago, for our fortieth anniversary I chaired the campaign [40th Anniversary Campaign, 2017] and
together with my colleagues and a lot of assistance from staff, we raised a million dollars that has been very helpful to us in consolidating our financial position. I'm often asked what instrument I play and the answer is I don't. Wish I did, but I've been involved in listening to classical music since I was a 10 year old, and the skills that I bring to the organization are management and finance so I think that's my start, my middle ground, and where I am today. I'm still active. We're always fundraising, and we're always having to deal with financial matters, which like any organization any not-for-profit is is difficult.

**Cody Goetz** [00:04:49] Thank you. Moving on to the second question: what do you see are the internal strengths and weaknesses as well as the external challenges and opportunities of the CMF-CMA organization.

**Stakeholder Two** [00:05:03] That's a tough question as you probably know. It's one that we debate annually at our retreat where the board members come together and discuss those very things: the strengths, weaknesses, opportunities, threats, and boy they're really there. But let me take it in a sense one by one. The strength are numerous. The ambition, and I'll state this at the beginning, is to make the Colorado Music Festival the premiere Colorado summertime destination. The ambition is to make it at least a nationwide destination, and we think that we have the constituent parts to make that happen. So what are they? Not necessarily in an order of priority, but let's start with the fact that we have now a very skilled and grounded executive director in Liz McGuire. She is, to the best of my recollection, the first executive director who actually plays an instrument at performance level, and we haven't had that before. Her staff are settled in and really competent. I wish we could pay them more, and we are planning to pay them more. They're somewhat underpaid at the moment, and that's always a risk. Last year, we lost two members of the staff to other not for profits. The orchestra. I believe you are aware from
your research that it's a world class orchestra. People don't realize just the extent that that is true. We have, for example, amongst the orchestra members seven concert masters, thirty-one principals and ten assistant principals. When you add when you add that: 48 members of a typical 80 strong orchestra it tells you why many of the orchestra members have been coming for 27 years. Mary Ellen Gorey, for example, from San Antonio Symphony is our longest serving member. And why do they come? Well, they love Boulder; they love hiking and the outdoors. But I think more than anything, and I get this from talking to them, they love playing with colleagues of their own orchestral level. And they raise that to such a magnificent performance level. And that brings me to how our new music director, Peter Oundjian, who spent 14 years with the Toronto Symphony and turned it from a B to an A. It became world class and it toured. He has the qualities; and why on earth would he come to little Boulder and become the music director of the festival? I think for the reasons I've given: the orchestra, Chautauqua. Playing inside the barn at Chautauqua, one musician described it as like performing inside his own instrument. The sound quality is just so terrific. Then because of the quality of the orchestra and the music director, we are able to attract rising stars, and we have done over the years. We've had Yo-Yo Ma play here when he was a beginner and I could name three or four other household names. We are also able because of that same quality to attract performers like pianist [Yefim] Bronfman, who, when he first heard through his agent the opportunity to come to the Colorado Music Festival he said, "what? Never heard of them." And then he listened to some pieces and he said "okay." So that's an important strength that I think that we have. Let me turn briefly to the weaknesses. We face ever increasing expenses form staff healthcare to Chautauqua, who just doubled our rent. We had to make a deep swallow, but we don't want to move from Chautauqua. Finding a younger audience. Everybody involved in classical music knows that if you look at the
audience, and you see gray, and you see aging. You also see skilled audiences who understand what the festival is trying to do. We also haven't established our brand. There's confusion always about the name: Colorado Music Festival, "where do they play?" Colorado is a big place. I think, obviously, on the external weakness, we have competition that has grown exponentially over the years, particularly from the mountain communities. When we started Colorado Music Festival, we didn't have festivals competing with us in Breckenridge. We obviously had Vail, and we had Aspen, but now, every mountain town virtually has a festival. They don't rise to the level that we do, but that doesn't alter the fact that people come. So, overall shrinking audience. We have made a decision not to go the route of many other festivals and become a purveyor of pop music and basically anything other than serious classical music including chamber music, commissioned works, and including contemporary composers. We know that if we played Beethoven's Fifth and Mahler every week we'd probably have a bigger audience, but we'd have bored audience. So we really believe that we need to expand on that. Strangely a weakness that we have no control over, at least yet, is the lack of coverage by the media. The Daily Camera no longer has anyone who covers classical music. Kelly Dean Hanson used to do that, as you probably know, and did an extremely good job. We are trying to find ways through social media and other methods of getting the word out, particularly if we play a brilliant concert on a Thursday and we're going to repeat that on Friday. Who knows? It's like a tree falling in the forest, so we need to do something about that. So I think that gives you a sense. About the Center for Musical Arts, founded in 1995 and merged with, as equal partners, Colorado Music Festival in the 2000s, the strengths of CMA are we own our own building. That's a valuable asset. We have a dedicated staff and faculty. We offer something for everybody. "Music for all for life" is our tagline. And we really do cover babies to boomers, cradle to grave, so to speak. We are well-funded. We have
the capacity to grow, and the weaknesses lie in competition from other music schools, at least one of which is more centrally located than we are. About being out in Lafayette and Louisville, we are able to attract the growing population in that area and we are making a great effort to make sure that we increase the number of students during the day, which is not the easiest thing to do. So capacity wise, rehearsal rooms are pretty much used from the afternoon onwards, but we have capacity during the day.

Cody Goetz [00:16:58] So based on your perspective and experience, how does CMF-CMA internally collaborate to serve its mission providing music performance education opportunities to the Boulder Lafayette communities.

Stakeholder Two [00:17:14] First I just push back slightly on say that it goes beyond Boulder and Lafayette. It really includes now all the fast growing Boulder County areas: Erie, Louisville, Superior. They're all fairly easy to get to two hundred baseline where the school is and the school is a comfortable building. It's been modernized. We've spent seven hundred thousand plus dollars on modernizing the building and creating good facilities. We still have a little way to go. But by and large that's happening. Finding the areas of common ground between music festival in the summer and school year round is not easy. And in the early years, there were some moaning and groaning about well this was supposed to be a merger of equals but in fact CMF became the dominant player and that to a much lesser extent exists today because we've made the effort to bring onto the board the people who live closer to the school or live in the outlying areas and whose particular desire is to see the school improved. We've discussed this at numerous retreats: how can we bring CMF advantages to CMA and vice versa. And I thought about this question and through some thoughts on paper. For CMA students we provide the opportunity for young performers to sit on stage during rehearsals, and be with real live high-level performers. We offer
master classes by visiting stars, and that's a wonderful opportunity to provide encouragement to our students. We're able by virtue of exposing them to the music festival to show the students the opportunities that exist. And we hope obviously to be able to be a feeder into the college of music if we do to a certain extent. From the music festival point of view, the benefits have been mostly financial. They're limited from a performance viewpoint, for obvious reasons. But I'm delighted to tell you that our president this year, Stephen Trainor, is a very well qualified musician and he sits in with the jazz performance band. There's a growing closeness between the organizations.

Cody Goetz [00:21:06] Describe CMF-CMA values in three words.


Cody Goetz [00:21:38] Based on your perspective and experience does CMF-CMA serve similar constituencies with its summer music festival and community music school or do the programs serve different audiences?

Stakeholder Two [00:21:50] I think the programs have different audiences. We encourage the students and encourage them by offering them huge discounts to come with their parents to festival performances and we're seeing some success of that as we measure the number of attendees. I think the the Center for Musical Arts offers the opportunity to constituents to become involved with music. We have an instrument lending program for example, and as I said before, we cover the ground from babies to adults and so through CMA we really offer the opportunity of becoming involved in depth with music.

Cody Goetz [00:23:02] Where do you see the organization in the next three years?

Stakeholder Two [00:23:10] I see growth in the Center for Musical Arts. As we collaborate more closely with schools and encourage music in the schools, which has fallen off at the school
level and we're trying to get it back in. So I see growth from that opportunity. I don't see much change in faculty, it's already pretty good. As I said earlier, we have the capacity and we would like people to say: "Center for Musical Arts" as the first thing that they say when they are being asked where's a good place to send my child. As far as the festival is concerned, we are determined to break through the barriers of geography and become much more of a destination for people from other musical centers: New York, Chicago, St. Louis anywhere there is still an audience for classical music. And they will hear about us because of the strength that I mentioned earlier and particularly the presence of Peter Oundjian And our aim is to get broader coverage. So we would expect to have maybe a couple of reviews, not next year, but perhaps the year after by the New York Times or Washington Post, others that actually do still cover classical music. So breaking through the barrier so that we do indeed become the summertime festival to attend. By all means come to Boulder for a week. We will offer you the opportunity of combining your stay with restaurants, with guided hiking, with opportunities to see the Colorado Shakespeare Festival, then you can go from here if you want to Vail or Aspen or Breckenridge or Steamboat Springs. So I think three years from now, I would like to see us have ticket sales at the level of 80 percent of the capacity of Chautauqua, which is about a thousand two hundred seats and a continuation of bringing in the rising stars. This year for example, we have at least two guest artists every week of the festival. That's expensive, but we have community support. The community leaders, the city council, and others are very conscious of what we bring to the overall beauty that is Boulder.

Cody Goetz [00:27:17] Well thank you so much. I really appreciate it.

Stakeholder Two [00:27:19] Pleasure.
Stakeholder Three

Cody Goetz [00:00:36] Describe your story with the CMF-CMA. For example, describe how you first became involved with the organization, how your role has changed, and what it looks like as of today.

Stakeholder Three [00:00:49] Okay. So Peggy Bruns and I, when we were graduate students in the mid 1990s, joked about starting a school and the joke came reality because it really wasn't a joke and it was really a shared philosophy that's very similar to, well it's identical to, the community schools of the arts across the country. There are about 450 schools like this across America, mostly on the coasts. And that was founded on the foundational value that art should be accessible to everyone. The settlement schools I grew up very close to were in Philadelphia...You probably know about these. I had friends teaching at MacPhail and we just decided that we were going to give it a try because there was nothing like that in Colorado at that time. At all. No community schools. So we did two years of research with very supportive spouses who said just go for it. One of my friends stepped forward and purchased the property at 111 West Cannon which is a 2,200 square foot former church building. So we go around converting churches...He purchased a building and said, "look I want you to give this a try" and he gave us free rent for two years. So with the result of all that planning...two years really of researching what it takes, what we should do, we had to get a special needs review with the city...I'm condensing a little bit...but we ended up opening with 13 students on the first day. And by the end of the first semester we had 50. And by the end of the first year we had a 100. So it was clearly something that the community wanted and supported except for the guy who said "if you open a music school in my street I'm going to chain myself to your front doors." He didn't do it. But you know there were a couple of weird things like that, but mostly people just came out
from everywhere and helped and celebrated it and showed up for performances and it was fantastic. So we lasted there for three years, and outgrew the building very quickly. After a summer of renovating, we had four studios in the beginning and a little stage. The room is a little bigger than this room [Grimes Hall at CMA]. And that same family friend I can name them if you'd like to...It's the Ertl family...This building came on the market and we decided to go for it… we got a mortgage and see what we can do because we're doing well. People were showing up. The faculty...it was amazing. There were lots of our colleagues from grad school...lots...lots of CU support...Tons of CU support actually...And I could name those people if you want that information...But anyway this building came on the market...We were going to buy it for three hundred fifty thousand dollars as an organization went to the closing and there was a wire from...It was anonymous, but we kind of knew who it was, and the building was paid for from day one. And we got a nonprofit facilities fund low interest loan to renovate this building...there was asbestos downstairs...But the community support is what I really want to emphasize because it was astounding, and I think after the third year in this building we had probably 700 students. We started collaborating with the CMF. We created educational programming for them. For years, we worked with Michael Christie, did lots of work with the Young People's Concert, which thank God is renamed, and there started to be some rumblings about "let's merge let's merge." What a great idea it would be to merge. And there was a taskforce set up I believe was 2008. Lots of conversations, board members, staff members, and we decided to move forward with it. Because the presentation from CMF was "look at what an amazing community organization we could create." And we bought it. I don't know if you have found this from who you've been speaking with but, and I'll just put this out there that the merger was disingenuous. That it was a strategy to stay in Tier 2 of SCFD funding. After the fact, long after the fact, we
went back and found board meeting minutes that suggested finding a Tier 3 organization to merge with so that they could keep their threshold funding. So it was disingenuous. Peggy and I eventually cut ties and we were banished from the organization literally. I know one of the individuals you spoke with from the board actually told me that I was no longer welcome in the building during that period. So something happened with the leadership. There was a spate of terrible leadership, and I think it was tanking and Liz showed up and really turned it around. I really give her a lot of credit.

**Cody Goetz [00:06:51]** And so what does your relationship look like today with the organization?

**Stakeholder Three [00:07:07]** Well, it's a healing one...It's healing one...so I'm around a lot. I've been Education Advisor for about a year. And what I'm doing really on a daily basis is to try to clean up some of the neglect. Because, what happened during the interim was that there was no oversight of faculty. There was no evaluation. People were just dropping their kids off for lessons and leaving, and the faculty was really left on its own to just do whatever teach lessons or whatever. So there's a lot of that. In the beginning, we paid faculty at a 75-25 rate because we wanted to keep overhead really low and admin low and value them for their teaching because they were the best people we could find in. When I came back on his educational advisor, the faculty pay ratio was 64-36. So they actually have been cutting faculty pay by not actually cutting the amount that they're charging for lessons, but by whacking the percentage and the faculty stayed. There are seven or eight core people that stuck around...that have been here since 2000. So there are things like that going on, and what I'm trying to do is build resources for faculty, support them, and just let them know that they're valued. You know, it's not really a surprise that they weren't being supported, that they weren't being given what they needed, and
that student numbers had been going down. So right now, I think they're holding steady and we're trying to create some new programming, create some different kinds of strategies like a la carte pricing. So if some retired person wants to take lessons every two weeks. That's fine. Or they're traveling and you know that sort of thing, we will make arrangements to suit them just so they can make some music.

Cody Goetz [00:09:42] The second question: what do you see are the internal strengths and weaknesses of the organization as well as the external challenges and opportunities for the CMA CMA organization.

Stakeholder Three [00:09:55] So this is a little mini SWOT isn't it?

Cody Goetz [00:09:57] Yes it is!

Stakeholder Three [00:10:01] Strengths. Currently, I'm going to say the leadership. Liz is well qualified. She's very good human and she's a very good ED, which I think is fundamental. I think the staffing is very good. The faculty is very strong. The orchestra in the summer is spectacular. I would say the biggest weakness for this organization is the board. The board doesn't understand how to be a board. And I'm mad, and you can print it if you want. But there are board members on the board that have been there for 40 years. So they don't observe term limits. Rather than being a true governance organization they really kind of push the staff around or try to. But Liz doesn't really let that happen much. Well they tried. So I think that if the board were more functional, this would be a dynamic kick-ass organization. You can write that too, that's fine. Remind me, external challenges?

Cody Goetz [00:11:12] Yes, external challenges and opportunities.

Stakeholder Three [00:11:17] You know, I think if we move forward in the true intent of the merger, of what I really thought was happening back then, this is really one of a kind of
organization. There isn't really another one. So we can let all that be pass, "water-under-the-bridge" kind of thing, and move forward and create amazing education programming. We're trying to do a few things like that this summer, just a couple weird little things, like the symphony squad, for little kids. Peter Oundjian is actually inviting them to come up on the stage and sit in the middle of the orchestra during rehearsal. Nobody really does that. So things like that. There are some challenges with other little schools cropping up. Rocky Ridge is expanding. They're doing satellites and they're doing great work. SoYoung is fabulous, she's a wonderful colleague and musician. But for example a little place cropped up in Broomfield called The DaVinci Center for Musical Arts. You know, and they're teaching lessons on just a few instruments, but things like that. So parents...if you have a kid looking for lessons there are a million options around here or so why come here? So we need to be very strategic about it, I think. Also it's growing here in the east county so getting here logistically...if it's easier to take lessons in Broomfield they'll stay in Broomfield. But so we need to give people a reason to come here. Other strengths are really people that love this place. There's a group called the Broadway boomers; they're donors. They have found a community here. They sing together. They make music, they learn. They're terrible and they're fabulous...At the same time, you know? And that's what it's about. It's really about giving them a form and an access to making music. That's what it's about.

**Cody Goetz [00:13:40]** Great. Thank you. Third question. Based on your perspective and experience how does CMF-CMA internally collaborate to serve its mission of providing music performance and education opportunities to the Boulder Lafayette communities.

**Stakeholder Three [00:13:57]** You mean with each other?
Cody Goetz [00:13:59] Yes. You kind of alluded to it a little bit with educational programming that's heading up to the festival. So aspects like that. That's what I'm trying to get at.

Stakeholder Three [00:14:12] I think the organizational culture has shifted so much in the past decade. And right now, it's at a place of openness. People are not afraid to talk to each other. People are not afraid to bring up ideas, toss them around, evaluate them, and see what we can do in terms of resources. Really, I think, in a really high functioning arts nonprofit, every department has to communicate and work together. For example, development and program: I have to work with the development directors to make her understand what to put in a grant application or something like that and that's happening. So I think there's good synergy in the admin staff. The faculty are starting to come alive again; they're starting to wake up and they want to play together. They want to do recitals together. They're wanting to chamber music. They want to do gigs. We're trying to raise some money to get them out into the schools that dried up. But you know we have a sort of fluid instrumentation small group so we could send a string quartet or woodwind quartet or trio. They're stepping up. Our faculty really supports their students. There's recitals all the time. They come. They get a small teeny honorarium for a faculty recital. But they all do it. I think there's more opportunity with the CMA and the orchestra and discussions are starting to happen. Peter's very open. He's brand new as music director so he's great. People are willing to try anything and the obstacles are...Was that part of the question?

Cody Goetz [00:16:19] No. But you can add it!

Stakeholder Three [00:16:23] There's a couple of obstacles that I can think of and they are board related about this is how we used to do these things. We shouldn't do that. The festival is wonderful, but the quality of the school isn't that good. And this is from a board member who
really has never seen anything the school's done. So comments like that and that kind of negativity and narrow focus of judgment has been detrimental to what we really could accomplish. So, there's been a challenge of combining organizational cultures and that's been the way bumpy. But I do see that with some changes it could gel.

Cody Goetz [00:17:25] Describe CMF-CMA values in the three words.

Stakeholder Three [00:17:32] Well there are four (stakeholder and interviewer laugh)

Cody Goetz [00:17:36] Three words.

Stakeholder Three [00:17:39] Um, the original arms RMCMA values were: excellence, access, community, heart. We have brought those back, um, I think they're self explanatory, but we want to do the best job we can with the best people we can. But at the same time we want the students to be excellent as they can. Not all are going to Juilliard or CU or whatever. But we want them to make good music. Access is about anybody anybody. Because I think you probably heard the special needs group [N. B. they were performing earlier in the day]. Anybody.Uh, community is really from the settlement school idea. This is a community you walk in the door and you're in community, and the heart is really how we do it.

Cody Goetz [00:18:38] And if you had to describe three words for the entire organization what would they be?

Stakeholder Three [00:18:45] That's a great question.

Cody Goetz [00:18:51] I love the other words by the way. But what are the three for the entire organization.

Stakeholder Three [00:18:59] Well I think they translate; excellence has to go both ways. That's the major one. I want to say dynamic, but I'm hesitant because we're not quite dynamic. But there is some dynamism happening. I mean that's what I would want...I know this is not
really answer your question, but I'd just like to see more excitement. I am going to add one of the words as potential and I do believe there is potential.

Cody Goetz [00:19:43] And the last one?

Stakeholder Three [00:19:45] Potentially dynamic? (both laugh)

Cody Goetz [00:19:44] Make it a little different.

Stakeholder Three [00:19:50] Really I'm just coming up with phrases. But you know music really has to be front and center. All of these things we've talked about in music.

Cody Goetz [00:20:01] Is that a good choice for that last word?

Stakeholder Three [00:20:04] No.

Cody Goetz [00:20:05] No? (laughter)

Stakeholder Three [00:20:09] Are you talking about the organization's mission or as we function as a group?

Cody Goetz [00:20:14] Well, I'm interested in what people put as value words to the organization as a whole. Because part of it is that I would like to compare to see what values people have for this organization across the spectrum. So and that's why I'm trying to limit it to three words.

Stakeholder Three [00:20:34] You know that's really smart. I don't see that they differ really from those from the four values that I gave you. But if I had to choose the three of them, the heart is missing right now.

Cody Goetz [00:20:57] All right. Thank you. You've kind of alluded to this but I'm going to ask this question anyway is based on your perspective and experience does CMF-CMA serves similar constituencies with its summer music festival and community music school ordered the programs serve different audiences?
Stakeholder Three [00:21:17] Definitely different audiences.

Cody Goetz [00:21:21] And is it OK?

Stakeholder Three [00:21:26] I think if we had actually moved forward in with the true intent, not the disingenuous intent of the merger, we could be better blended now. So I'm working on a project right now to get a concert bus and take them up to a concert or adults and there's a retirement community down the road. There is no reason that the CMF audience needs to be mostly in their 70s and that's what a recent market research thing found out really. I mean it's the same thing. It's the graying of classical music audiences, but I don't believe that has to happen. And it makes total sense that we have a... what do you call that? I mean there's just a conduit of students lines.

Cody Goetz [00:22:25] Pipeline?

Stakeholder Three [00:22:25] Yeah. It's like a feeder system. Here's a bunch of students of any age. It makes complete sense that they should be going to those concerts. Those musicians should be teaching master classes here and that's happening. It's going to start happening so we could do a much better job of blending. I think there is a little bit of elitism that is still attached to CMF and that's OK with some of the oldsters.

Cody Goetz [00:23:05] Okay. Last question. Where do you see the organization in three years?

Stakeholder Three [00:23:17] Mm hmm. Well that could be a two pronged question because it could be realistically or it could be idealistically.

Cody Goetz [00:23:27] Go for both.

Stakeholder Three [00:23:28] OK I'll go idealistic with you. I think ideally audiences will build. Peter will just...you know...we put a lot of responsibility on him, but he's a dynamic conductor. He's great. Some of those audiences grow; we get accredited. There's an accrediting
organization with 16 community schools of the arts in the country that are accredited. I think with some work in three years we would apply for that. That would give us some clout and more credibility than we have. And we would be really blended in terms of education and performance. It would really just be back and forth. Realistically I do think that can happen. I think if the leadership's pretty good right now. But if the board culture changes that can happen. I'd love to see a thousand students and a fully packed festival.

Cody Goetz [00:25:04] This is slightly um not relevant, but how would you go about changing board culture?

Stakeholder Three [00:25:13] Uh...(laughs).

Cody Goetz [00:25:16] Idealistically if there's an ideal...

Stakeholder Three [00:25:18] Um, I would observe term limits. Observe the bylaws. Tutor the board. Teach them what it means to be a board. Because it's about governance. It is not about micromanaging the staff or feeling good about yourself by thinking that you're doing something on this board. Self-importance. And it's not just a sport, just to be fair, because I've been doing consulting work for 10 years now with organizations of many different sizes and there is some of this on most boards. But if there is good leadership and you let term limits happen it's helpful.

Cody Goetz [00:26:18] Sure. OK. Thank you so much.

Stakeholder Three [00:26:28] Sure.

Cody Goetz [00:26:28] I really appreciate it.

Stakeholder Three [00:26:30] If there's anything else you want to know in my opinionated fashion let me know.

Cody Goetz [00:26:36] Most definitely I will. Thank you so much.
Stakeholder Four

Cody Goetz [00:00:01] Thank you so much for coming in to talk and share your story about the CMF-CMA. So our first question: describe your story with the CMF-CMA. For example, describe how you first became involved with the organization, how your role has changed, and what it looks like. As of today.

Stakeholder Four [00:00:24] I was invited by Kathy and Peggy, who I just met, to join the board in November 1995. I did that and I continued to volunteer for about five years, I guess it was, through December of 1999 and after that became their first development director. I think it was year 2000. I worked in that role until spring of 2006 or maybe 2005.

Cody Goetz [00:01:18] As of today, what's your relationship with the organization?

Stakeholder Four [00:01:24] I'm an occasional student and an occasional event attendee.

Cody Goetz [00:01:35] So based on your perspective, what do you see are the internal strengths and weaknesses of the organization as well as some external challenges and opportunities of the CMF-CMA organization.

Stakeholder Four [00:01:52] Well, given I only know it more from a distance now...Certainly the strength is in the merger considerably more access to donations, and the amazing building remodel that took place in the last few years thanks to some very generous gifts. That was something I worked very hard on in 1999 to get this church converted to a school. Thus the Grimes Hall.

Stakeholder Four [00:02:25] But we were doing it on a total shoestring [budget] like twenty-five thousand dollars that we had borrowed, and fifty thousand dollars worth of in-kind contributions, so we couldn't do nearly as much as was needed. So I'm very pleased to see what the place looks like now, physically, and I guess challenges...just continuing to get the marketing
out so people in East County know this place exists. Now of course people in Boulder don't know it all, so that's a whole other challenge. I think joining with the CMF helped the CMA get more visibility in Boulder. Each of those organizations was quite geocentric to where they have been founded.

**Cody Goetz** [00:03:23] Do you know, as far as the internal weaknesses, what from your perspective, if you noticed any.

**Stakeholder Four** [00:03:34] I couldn't really comment on that now.

**Cody Goetz** [00:03:35] Sure...that's fine.

**Stakeholder Four** [00:03:37] Fundraising is always an issue but it's not a weakness.

**Cody Goetz** [00:03:39] Sure. Sure. And as far as the opportunities that you see from a distance?

**Stakeholder Four** [00:03:48] Growth. More people playing music, more people listening to music, more neighbors finding friendship here. All of it.

**Cody Goetz** [00:03:55] Based on your perspective and experience, how does seem CMF-CMA internally collaborate to serve its mission of providing performance and education opportunities to the Boulder Lafayette communities?

**Stakeholder Four** [00:04:18] How does it collaborate internally? I don't really know. I mean, I suppose students here could be given discounts to concert tickets or concert goers could be given discounts to lessons or some kind of cross-marketing between those populations, which I think are still quite different. But I don't really know. I don't know what the data says about how much student attendance takes place at concerts or concert goers come out here for events or lessons.

**Cody Goetz** [00:05:02] Ok, the next three questions are unprepared. Describe the CMF-CMA values and in three words.

**Stakeholder Four** [00:05:15] Music for all.
Cody Goetz [00:05:20] I like that! Can you also give me three distinct words like adjectives or they don't have to be adjectives but...


Cody Goetz [00:05:44] Ok, so you kind of alluded to this in a previous question, but based on your perspective and experience, does the CMF-CMA serve similar constituencies with its summer music festival and community music school or do the program serve different audiences?

Stakeholder Four [00:06:09] It feels like they're really different to me, but that's an old bias I've had about Boulder versus the East County. And I would love to see what the data says and I'm sure there's data.

Cody Goetz [00:06:32] And do you think that's a good thing? Is that okay that they're different?

Stakeholder Four [00:06:41] I'd rather see them more integrated. However, the CMF concert goer maybe is not someone who wants to take lessons. Right? Yet, I think probably anyone who takes lessons ought to be going to concerts. And there are many things that happen out here besides lessons that the CMF concert goer could attend and many do, I think, with fundraisers particularly. That was my area of development so I'm not much on the music side, but I was on the money side. It's really expanded so nicely here...since the merger.

Cody Goetz [00:07:27] Last question: where do you see the organization in three years?

Stakeholder Four [00:07:42] I guess same is now, just more of everything.

Cody Goetz [00:07:54] Anything else you'd like to add? If not that's ok.

Stakeholder Four [00:08:06] I think I would like to express my gratitude for everyone who's touched this space now for twenty-three years and how a concerted group of people, not to pun, can really get a lot accomplished that endures.
Cody Goetz [00:08:33] Okay. That's it.

Stakeholder Four [00:08:34] Yeah.

Cody Goetz [00:08:35] Thank you.
Stakeholder Five

Cody Goetz [00:00:01] Thank you so much for coming in and speaking to me today about your involvement with CMF-CMA. The first three questions are going to be prepared and provided to you via email and then the last three will be on the spot questions.

Stakeholder Five [00:00:20] Okay.

Cody Goetz [00:00:20] The first one: describe your story with the CMF-CMA. For example, describe how you first became involved with the organization, how your role has changed, and what it looks like as of today.

Stakeholder Five [00:00:35] Okay. So I started teaching here in 2000. Peggy hired me to teach voice over at the other building on Cannon Street and then about six months later approximately we moved into this building. So I've been here a really long time. And then, as you know, there was the merger and we went through various other iterations of the administration coming and going. And at that point, when there was sort of a need in the office I stepped up and applied to be the music education coordinator at a part-time basis and I still teach a little bit. So I've been doing that for about four or five years now.

Cody Goetz [00:01:38] So administrative is four to five years and then teaching is from 2000.

Stakeholder Five [00:01:42] Mm hmm. Yeah.

Cody Goetz [00:01:43] Great!

Stakeholder Five [00:01:44] Yeah. And I still have some students.
Cody Goetz [00:01:46] Okay, the second question, what do you see as the internal strengths and weaknesses of the organization, and what might be some of the external challenges or opportunities of the CMF-CMA organization?

Stakeholder Five [00:02:12] Okay, so first internal strengths and weaknesses. It's got a great deal of community support and people who have grown up going, their kids going to music lessons or taking music together, and then as they get older then a new generation comes. They come in as kids and then they bring their kids when they have kids. So just because we've been here so long, and we've...from the start...it's been a community school. So that is a great strength, I think. Weaknesses...it's keeping that going and not getting caught in a rut, but continuing to evolve with the needs of the community, I'd say. And so that ties in to external forces because there have been many other music schools growing up in the past 20 years. And so our audience is changing somewhat and some of the people that would have come here 20 years ago are now going to other places because they're either closer or have a specific focus like School of Rock. You know, they might go just for that. So there's more competition anyway.

Cody Goetz [00:03:45] And what would be in some of the opportunities in the organization.

Stakeholder Five [00:03:50] Well I think that if you're keeping an eye on those ships and in the sort of community that you're serving that and not just sticking with let's do everything exactly the same way that we always have then you have a chance to grow into something even more exciting.

Cody Goetz [00:04:08] The third question. Based on your perspective and experience how does CMF-CMA internally collaborate and to serve its mission of providing music performance and education opportunities to the Boulder and Lafayette communities.
Stakeholder Five [00:04:33] OK. Sometimes those can't be exactly the same things.

Like...Because of the slight geographic distance, we might offer educational things that the school provides. But if we're doing them at Chautauqua it's not necessarily the Lafayette community that's coming. It might be providing education to more the Boulder community.

That's not too big of a deal because we've always had students coming from Boulder who come out here as well. So we've really always done both, but now that there are more music schools in Boulder, we don't have as many music students who are coming from from the west side.

Because we have this space, we can use this space to bring some of the things that don't fit up at Chautauqua and bring them out here and then hopefully offer them to the community that's closer. And then on the other side since we've got the orchestra playing up there we can encourage...we have discount tickets and stuff for our students to go up there and also to like the pre-concert events to get people to just have more understanding of what you're hearing.

Cody Goetz [00:06:28] Thank you so much. The fourth question, describe CMF-CMA values in three words.

Stakeholder Five [00:06:45] Accessibility, excellence, and...it's always hard to give a third one...I don't know you could go with...the joy, like the joy of music. Or I could go in the direction of community. So that's either two or four. I don't know. You could pick.

Cody Goetz [00:07:21] Okay, can you decide between the joy or community?

Stakeholder Five [00:07:24] I'll say that...yeah let's take community.

Cody Goetz [00:07:31] Based on your perspective and experience the CMF-CMA serve similar constituencies with its summer music festival and community music school or do the programs serve different audiences?

Stakeholder Five [00:07:50] For the most part different. And then there's some overlap.
Cody Goetz [00:08:00] Do you think that's okay? Or would you rather...

Stakeholder Five [00:08:04] I think what you have to do, is, from my perspective, is devise the program for these different communities. But then you try to get them to merge as much as possible so that people who are in charge of programming the concerts, they're picking the things that make the best concerts for the concert goers and then we're trying to get the students..."Like this is a really good concert. Go to that concert"...And the same thing with devising the classes that are the best for that particular type of student. And then you know, if you can get the word out if it's like an adult ensemble like say the Broadway Boomers there might be some concert goers who are like "aw, I like show tunes too...I'm going to go sing with them." So you start with going for what you want to go for not watering it down, and then you try to bring the other group along.

Cody Goetz [00:09:09] Okay, thank you. The last question. Where do you see the organization in three years?

Stakeholder Five [00:09:16] That's not very far ahead. Um...Now I'm realizing that one of the limitations that I should have added in is that we're almost at capacity just building-wise. And so, if I were dreaming, I'd like to see some space either through a satellite campus somewhere, or you know, finding a way to put more space in...there's some days where we've got every single studio filled and people teaching in both halls. So I think...I'd like to see...the...the same amount of things that we're doing, but just get more people involved with them. So....classes that are fuller maybe and whether that means certain classes get tailored to a new audience...but I think that's very probable that we will....Let me see if there's anything else....I mean the size is really the main limitation for that.

Cody Goetz [00:10:54] Do you know how many studios the building houses?
Stakeholder Five [00:10:57] 13 and the two halls. We have about 38 faculty members. You know, some of them only come in one day a week. Some are only for a couple hours, but because of the nature of lessons most things are between say 3:30 and 7 on weekdays. And so everyone wants those times.

Cody Goetz [00:11:34] Yes. Yes they do. And that's all I have.

Stakeholder Five [00:11:40] Okay great.

Cody Goetz [00:11:40] Thank you so much for answering these questions for me today.

Stakeholder Five [00:11:44] Yeah. I hope you have a good experience with your projects.

Cody Goetz [00:11:49] Thank you so much!
Stakeholder Six

**Cody Goetz** [00:00:01] All right. Thank you so much for coming and talking to me about your perspective on the CMF-CMA.

**Stakeholder Six** [00:00:09] Absolutely.

**Cody Goetz** [00:00:09] So we're going to start with the first question. Describe your story with the CMF-CMA. For example, describe how you first became involved with the organization, how your role has changed, and what it looks like as of today.

**Stakeholder Six** [00:00:24] So I first became involved here through one of the co-founders Peggy Bruns. She was the H.R. person at the *Daily Camera*. And she was a flute player, or she is a flute player. So I'm a harp player. So she needed a new harpist. And so that's how I first met her way before she started the school. So we played flute and harp gigs together. And then when she started the school, I became one of the first harp teachers over at the Cannon Street building. So I did that for about a year and a half to two years, something like that. And then left for a while and then kind of hooked up with her later in talking about starting some kind of community band thing. And then a few months later, the registrar position became open here and so she called and said, "are you interested?" I said, "absolutely." And it's, you know, it was because I knew her, you know, that I wanted to become involved because I knew her personality and just what she is about. But it's also because this particular organization goes after my purpose in life so it's not a job. It's my...I feel like my purpose in life is to to share the magic of music and to be able to facilitate that here as a registrar is just...It's not a job. So it's really cool. And then I've been here ever since. I've gone through, you know, all of the turnover, and the changes, and I think one of the reasons I've survived as the registrar is that everyone left me
alone. So they let me do my own thing. It was always the comment of the "school runs itself." It doesn't really, but that's what they thought. And that was great.

**Cody Goetz** [00:02:06] Yeah.

**Stakeholder Six** [00:02:07] And the teachers are the most important reason why I'm here, because there's such quality and such heart in the teachers. One of the office managers in the past used to say "just get up and walk around and see what happens here. Don't sit at your desk; get up and walk around and listen to all the great music." And it's cool to be able to be in that office because I can hear all the kids run upstairs you know come upstairs after the lesson [and ask] "What did you do today?" [imitates kid's excited response] "Oh, it was just great, I had the most..." So if I could only record all those...that makes my heart feel good!

**Cody Goetz** [00:02:39] Yeah!

**Stakeholder Six** [00:02:39] So what else...So how about in the middle...so that....What was the second part?

**Cody Goetz** [00:02:47] Second part was how has your role changed and what it looks like.

**Stakeholder Six** [00:02:52] So I kind of explain that.

**Cody Goetz** [00:02:53] Yeah. So the second question is: What do you see as the internal strengths and weaknesses of the organization as well as the external challenges and opportunities that the CMF-CMA organization faces.

**Stakeholder Six** [00:03:09] So I think the internal strengths are the people. So both the faculty and the staff, particularly the staff right now. It hasn't always been a strength of this organization, but it is right now and it's because the staff...everyone has heart. Everyone you know...and it's nice to not have to explain that to somebody what it means to have heart, which I did have to do to a previous executive director, but they all get it, and they're all very passionate about what
they do. And they also work together really well, and work, you know...so like you want to improve here let's see how we can improve, and let's you know take, you know, any kind of evaluation or whatever...it's just...it's an amazing group of people. I would say a weakness is definitely the board and that is because...they don't follow their term limits. So people have been there for the entire life of the organization, which just doesn't, you know...one of the weaknesses is [the idea of] "that's how we've always done it." And you heard that not only in the board, but you also heard in the faculty, and when we merged, you know, it was always like...there's something that still a lot of the old guard and the faculty have in their mind about how it's not working. And so they're not seeing the big picture now and how it really does work. They're just like, "oh this is how it always was in the past."

*Cody Goetz* [00:04:38] Sure. Okay.

**Stakeholder Six** [00:04:38] And I think another kind of weakness...I don't know if I call it a weakness, I guess I would, something that we're working on is how you market this place. You know, because it is a definite unique organization and really you're taking a performing group and a teaching group and trying to merge them together and they're apples and oranges and you can't really merge it together. We've talked about, in staff meetings, about are we an umbrella with two, or are we actually two separate entities? And we've always tried to force the umbrella. And I'm not so sure it works. Right now, I have to say with Kathy Kucsan coming back...The thing that we missed so much since Peggy's departure was the education director. And that's the part that I think both organizations needed because that's the tie between the two. And it's also the school needs that most. So I see a lot of the ties coming back. She's working to develop programs to tie the two together. Now, you know, we've tried to merge before, but she's
really...she has that knowledge. So she's not really forcing it, and there are things that can't be together.

**Cody Goetz** [00:05:49] Yeah. Two quick follow up questions, one are you just the registrar or do you also teach.

**Stakeholder Six** [00:05:56] I'm just the registrar.

**Cody Goetz** [00:05:57] Just the registrar, great. The second one is when you talk about marketing the organization would you say that extends to the brand image?

**Stakeholder Six** [00:06:06] Yes, Absolutely. Yeah. And so now we are, you know, that's a weakness, but we're working on that. So they've done a lot of the branding work on...starting that on the festival side, but they're also saying now we're going to do for the school side. So I feel the executive director is absolutely huge in that process right now. No one has really seen us as equals and she does.

**Cody Goetz** [00:06:29] Great, so what do you find, just to follow up, as some of the external challenges and opportunities of the organization so looking outward.

**Stakeholder Six** [00:06:43] I think we have a lot of outreach that we could do, that we're not going after, and that's pretty much, you know, like we do a little bit in the some of the preschools in the area, like one of them calls us every year and says come to meet the instruments, but we could also do a lot more with the Boulder Valley School District. They've been in the past...The staff has burned some bridges, but now we're willing to open those backup and hopefully we can, you know send it, a string quartet or whatever, horn trio, or whatever it is into the schools to do assemblies, because there are a lot of teachers that know about us now who are saying, you know, "oh you rent an instrument from the school but, why don't you now go take lessons.".

**Cody Goetz** [00:07:23] Are there any relations with Pioneer Elementary across the street?
Stakeholder Six [00:07:32] Yes, and that's always been a huge connection first started with the instrument thing, but yeah...

Cody Goetz [00:07:45] What are some of the opportunities that you see for the organization: for growth or for expansion or something that's, you know, external that you can see.

Stakeholder Six [00:07:59] Well, they're all internal. You know, getting more home school populations and you're getting, you know, building is not used before the after-school time. External...I think just...just marketing and getting people to know who we are, and what we do, maybe to do...I don't know...they tried a concert series. You know, that's really hard because you have to have somebody to manage it and...But that brings more people in here. We have a lot of renters that come in and rent, and that you know brings new people in. So anything that can bring the awareness.

Cody Goetz [00:08:36] Okay, so based on your perspective and experience how does CMF-CMA internally collaborate to serve its mission of providing music performance and education and opportunities to the Boulder-Lafayette communities.

Stakeholder Six [00:09:01] Well with that new education director and those new initiatives that she's doing, some of them are new...some like "Talks Under The Tent" we always did, but...hmmm. You know, I think one of the things we're trying to do is build back community, and that's a really broad and indescribable thing to do. So how do you how do you develop community, right? And so we're starting that, and we just painted the wall out there a different color, right, and we're going to make that the "Accomplishment Wall," you know, and put "Teaching for a Cause" or something in there, so that that's the first thing you see when you come in the building. That'll be one of those steps, tiny steps, to build community getting, you know, the parents to talk to each other, to talk to me, to talk to, you know, whatever, for
development, that could be good for, you know, fundraising...whatever, people want to give money, but just kind of that community building of this is a community of like minded music students who come here for a purpose and...I was actually in the room when they wrote the mission for the merged organization. And so it was pretty much done by the facilitator, who really kind of put words in people's mouth...Yeah, which was interesting.

Cody Goetz [00:10:22] Sure.

Stakeholder Six [00:10:23] You know, but at the time that was good, and I don't know...People have all kinds of opinions on the mission statement, because we're so different. It's really hard. So you put the performance and you put the teaching aspect in it, and you serve a certain community. But that's all you say. So that's very broad. You're not saying how you do it.

Cody Goetz [00:10:47] So the next three questions are unprepared. The first one is described as CMF-CMA values in three words.


Cody Goetz [00:11:25] So joy, commitment, and heart. Great! Thank you so much. So based on our perspective and experience, does CMF-CMA serve similar constituencies with its summer music festival and community music school or did the program serve different audiences?

Stakeholder Six [00:11:43] Absolutely different. So you know we have a whole problem of the orchestra, and the blue hairs, and you know where does it go from there? How do you get new blood...And the school as a feeder for the orchestra for future orchestra members, I do believe that.

Cody Goetz [00:11:58] Is the school also a feeder for audience development?

Stakeholder Six [00:12:22] Yes, absolutely.

Cody Goetz [00:12:26] And what specific things is the organization doing to make sure that...
Stakeholder Six [00:12:32] Again with the education director and right now we have a class in the summer, "Debra Explains a Symphony," which is four times when she'll explain the different works. So initiatives like that are coming in as classes or workshops to pretty much educate concertgoers essentially on that. There's also the academy is doing like their talks and I think they're just kind of one off things, the Talks Under The Tent" or you know explaining that too. So it's really the Education Department that is driving that.

Cody Goetz [00:13:17] And that's getting the students to go to the festival?

Stakeholder Six [00:13:20] So...That's the challenge, right? That's an absolute challenge because it's during the summer, you know, people get excited about it. You have to make sure that the students know...in the past we've targeted different instruments, you know, sort of here's a violin student studio, here's all the violin things that are happening at the festival. So we've actually targeted like that, which I think might be another good...it didn't really pay off because I think we did it too late, but, you know, just to make them aware, they also do get a pretty deep discount. As a student, and that I think will help, but a lot of people don't even...a lot of people don't even know what we do, but they also don't know that we have a festival tied to us.

Cody Goetz [00:14:08] My last question. Where do you see that organization in three years?

Stakeholder Six [00:14:25] I would love to see a whole new board or a lot of people gone from the board, because that drives the entire organization. So there's a lot of amazing new people in the world that could, you know, think of different things. So I would love to see that. And if that then happens, then all of that, not all, but a lot of the difficulties that we have right now...The staff spends time doing X Y Z, because they have to explain it to an old board member who won't let go of the past. You know, there's a lot of that going on. So I think, because the staff is so talented, they could spend their time doing the things that they are talented at, instead of
babysitting or whatever it is. I also see the building being used more, right? So, you know, let's get everybody in here during the day...do whatever...do a yoga [class] you know, whatever it is in this room, whatever yoga and music, and those things have all been talked about. They're nothing new, and just some progress on that, and then so that everybody knows about this organization, right? That would be awesome. There's no question this is the premier music school in this area to go to, and then to have, I guess, to have more students or more...I mean what does that mean, right? To have more students...does that mean more revenue? It just means...I think that the building is utilized more...The biggest thing that people come in and I say, "Why do you come here" because I ask everybody why they're here. [They say] "my friend told me about it" and that's huge. So we have to make sure we continue that...It's that word of mouth...it's that professionalism.

**Cody Goetz** [00:16:31] All right. That's all that I have. Thank you again so much.

**Stakeholder Six** [00:16:35] Absolutely.
Stakeholder Seven

Cody Goetz [00:00:01] Thank you so much for coming to speak with me about your experience with the Colorado Music Festival and Center for Musical Arts. So the first question is describe your story with CMF-CMA. For example, describe how you first became involved with the organization, how your role has changed, and what it looks like as of today.

Stakeholder Seven [00:00:26] I think in the beginning there were two reasons for me being here. Initially I was sort of recruited to become part of a jazz studies program that didn't exist here. And so it's kind of at the ground floor level and I agreed to do that while I was still a full-time teacher in the Boulder Valley schools. So that was one reason that I came here was to launch a program. And the second reason was that I needed a home for a young students jazz summer program called "C's Jazz in the Summer" and I needed a home for that because the high school where I was at was starting to charge me a serious amount of money. So I wanted to find a place that wouldn't do that. So that's how I got launched here.

Cody Goetz [00:01:29] And how has it changed since then and what does that look like as of today?

Stakeholder Seven [00:01:34] My program, the Jazz Studies part, is very healthy. I now have four full groups, three combos, and a jazz ensemble. So it has grown to that point. Most of the students are adults and a lot of our former students that I had in high school. So it's kind of fun that way too. They still look at me and wonder if I'm gonna say the same thing and I look back at them and say “well why don't you listen this time.” That kind of thing. So it's been fun. So it's healthy and grown to that point. The young student [program] I have discontinued because of local competition. I no longer do a summer camp for young players. There are other resources in the area that are sort of taking over their responsibility.
Cody Goetz [00:02:36] So from your perspective what you see are the internal strengths and weaknesses as well as the external challenges and opportunities of the CMF-CMA organization?

Stakeholder Seven [00:02:51] When I started here it was just CMA, so, at that point, things were moving along pretty well. We had a faculty that was fired up about what they were doing and we had about 40 people that were dedicated to various forms of music education. And so it didn't take much to keep that rolling. And I was excited to have a new program [and] they were excited to have a new program, and so it was pretty easy to get it going. However, as times develop, especially when we got to the merger in [2009] when the CMF became part of this, things changed a little bit in focus. Things became a little more challenging to make sure that we still did what our founders wanted us to do and that's provide music education for all levels for life. And, all of a sudden there was this new piece that we had to sort of develop and understand. It turns out though that piece was fabulous. I mean it's a world class orchestra that we now deal with. And so for me personally, it was an exciting time in a way because I got to meet and be around some fabulous musicians that I normally would not. And being a jazzer, it was very good for me to once again jump into the little jet world and get focused on some real fine music and some real quality players. Trumpet is my instrument. So, the trumpet section in the CMF is fabulous and I've gotten to know them quite well. And we have a lot of fun together. They laugh at me and I laugh back at them. And they know that I couldn't play a note like they did and they say they couldn't play a note like I do. So it's kind of fun.

Cody Goetz [00:04:52] So what do you see some weaknesses of the organization. Talked a lot about some of its strengths, but do you feel these weaknesses?

Stakeholder Seven [00:05:01] It's varied over the years. Leadership has been a problem for on occasion. We went through a period where we had three to four years of not quality top
management, in my opinion. And so we sort of became on our own. We sort of just came and taught and did our thing and there wasn't much camaraderie like [it] could be and was originally here. Fortunately recently that has changed to the positive. The management is better and really trying to make things go. And so we're kind of cooked up with it now. It's kind of going good.

**Cody Goetz [00:05:46]** What type of competition or external challenges in this organization do you see or opportunities for this organization?

**Stakeholder Seven [00:05:56]** Well it's kind of two parts. There are challenges that are out there. There is there are other schools of music. Cropping up all the time and even in this area. So our job is to remain visible, have high quality teaching, earn our reputation, and spread the word. And sometimes that's easy to do sometimes not so easy. So that's just...that's a challenge every day: how to spread the word that we're here to deal with that competition. What we have in terms of faculty is a constant thought of training. I mean people come and go. We don't have a lot of veterans anymore that stick here. We have a lot of teachers that are in and out and they don't have a lot of students so they just show up to do their great job of teaching, but then they're gone. So I don't know how else to deal with that. That's a situation that we're all thinking about.

**Cody Goetz [00:07:03]** So based on your perspective and experience how does CMF-CMA internally collaborate to serve its mission of providing music performance and education opportunities to the Boulder-Lafayette community.

**Stakeholder Seven [00:07:20]** With the word "internalized," I guess...I don't know exactly what you mean by that.

**Cody Goetz [00:07:25]** So, because you know these were two separate institutions at one time and now they're merged, and in some respects, they're working in completely different industries. One is a performance venue and the other one is a school of music. And so, I'm kind of curious
to see how traditionally two organizations in two different industries how are they working together under one governing body essentially.

**Stakeholder Seven** [00:07:59] OK. Yeah. There's been two phases of that as far as I can see. The first phase when the merger was fresh and new was one of standoffish...Like okay you're in orchestra were an educational institution. How are we ever going to...And then there became a period of time where thought was put into how do we deal with each other, how do we use each other to better each situation. I think the merger was more of a financial piece to start with to sort of make both organizations stronger financially. But then the reality that you just suggested how do we function together and use the capacities of each group to make us both better was, and there is still to this day a big challenge. What happened was we tried for a while to mesh some things. We did some stuff together, but the hard part is they're only here in the summer and so they do a great job of their thing and they're very busy, but to get them to participate in education was not always easy. And then there's the financial reward to them, how they're going to do that, etc. etc. So it's been a difficult situation to get them to participate in what we are. Plus, in the summer, it's more of a downtime here in education because students come and go and it's not as easy. So yeah, that has always been a question, but I think recently now under our current leadership, new leadership, there seems to be a philosophy of the CMA "go for it; do your thing; keep it strong; do your thing; don't worry about the CMF necessarily" and the CMF has the same deal. Let's get our season together, let's give five concerts, let's do our thing, and unfortunately, to me anyway, both ships seem to be going forward at a good pace on high water. Good job; but not necessarily meshing anymore and that doesn't seem to be a philosophy of wanting to do that. I know when I was announcing some of the concerts a few years ago, it was my job to sort of connect things and it was easy because the stage is full of musicians that are also teachers. Each
one of those players probably has students or is near it. So they're educators. Why can't we
expose...to publicize that? And at the same time, it'd be nice if they'd come out here, and sit in
and hang out. Go ahead, "hey, let me show you a couple licks.” You know I think that stopped. I
think currently, we are us and they are them.

Cody Goetz [00:11:10] The following questions are unprepared. Describe CMF-CMA values in
three words.


Cody Goetz [00:11:33] OK. Thank you. So you kind of alluded this in one of your responses to
the other questions, but based on your perspective and experience, does CMF-CMA serve similar
constituencies with its summer music festival and community music school or do the programs
serve different audiences?

Stakeholder Seven [00:11:57] I think we tried to blend in and make it work it didn't. And so the
answer is yes they serve different communities and audiences, and they serve them well. But.
The blending together, I don't see it.

Cody Goetz [00:12:12] And you think that's a good thing that they're separate audiences?

Stakeholder Seven [00:12:17] For a while, I hought that was really stupid thing, because why
are we merged then? I mean come on, let's go work together, do whatever. And I fought that for
a while and in some ways I guess I still am. But. I also agree that it's so different. They're here in
the summer. It's hard to do. We're here all year. We're an education...so the challenges is big to
try to make that work. And so I'm backing off. I'm doing my job here and enjoying it. And I go
sit and listen to those fabulous musicians enjoy that too.

Cody Goetz [00:12:59] And the last question. Where do you see the organization in three years?
**Stakeholder Seven** [00:13:10] To be honest with you, I hope they are still both surviving at the level they currently are. And if this current philosophy of just maintaining each place on its own continues, then it needs to be dealt with at another high level. And if so, I think there will be success for both. I can't really project that right now, but, based on what's gone before and the quality of the programs currently here, I would say success is on the docket for in three years.

**Cody Goetz** [00:13:54] OK thank you so much for sharing your story!

**Stakeholder Seven** [00:14:01] OK!
Stakeholder Eight

Cody Goetz [00:00:01] Thank you so much for being willing to share your story about CMF-CMA this morning. So our first question, describe your story with the CMF-CMA. For example, describe how you first became involved with the organization, how your role has changed, and what it looks like as of today.

Stakeholder Eight [00:00:23] Well I probably have as much history as anyone that you've talked to. I actually got initially involved way back in about 2004 I believe. And it really was through just coming out here. I was at an accounting firm at the time and I brought their [RMCMA] audit out. And all of a sudden realized that there were all these people who knew my husband, who was the band director at Fairview High School for years and years, also a CU grad and he is up on the Hall of Fame. So, music had always really been a part of our lives, although I'm not a practicing musician. I'm the appreciator in our family. But I got involved as a volunteer initially, and the next thing I knew I was on the board. And then I was the board president. And so I really saw the real inner actings being involved with, and at that point it was the Rocky Mountain Center for Musical Arts. But being involved with a founder organization and the workings of it. And so I was the president of the board. And then in 2009...I believe it was 2009...They began a task force. Which went on for a year to investigate the possibility of a merger with the Colorado Music Festival. And the RMCMA had been approached numerous times by other non-profits to look at the possibility of a merger and we'd never felt that it was really the right thing to do. The RMCMA, as you know, is basically a community music school. So yes there were performances, but as much education as anything that went on. And so after a year of the task force, and I was part of the task force also because I was the past president of the board at that point. And there was the current and present presidents of the CMF board and then
of the RMCMA board plus the founders and some others. And so we really did a lot of dwelling into looking at how a merger would look. And...It was very very challenging to say the least. I think the ideal situation was that...the Colorado Music Festival being a classical music festival at Chautauqua for years and their concert and attendees base as well as their donor base tended to be somewhat aging. And so they wanted to bring younger families in and the RMCMA, with our philosophy of music for all for life, we had students from everywhere from six months on up to their 80s and 90s even. And so on paper the merger seemed: "Wow. How could we make this work?" So ultimately, they did vote to move forward with the merger. And I certainly continued to be part of it, but then at that point I was also on staff at the RMCMA because I had had a background in development and Peggy Bruns and Kathy Kucsan the co-founders had convinced me to come on in the world of development. So I had really had the opportunity to see both sides. From the perspective of being involved in the board, also as a volunteer, and then now on staff. And so the merger to say the least was challenging. They had a board of 38 people. We had a board of eight people. And all of a sudden you combine these two boards. And it was a bit overwhelming. I always loved the quote that Kathy Kucsan used was that it felt like her baby had grown up and married some very-well-to-do person. The things that it brought to the RMCMA. I think the biggest impact we saw was the improved and additional marketing that we were able to get. We had a building, which we're currently sitting in, that was our offices and the RMCMA owned that building. CMF did not really have a building. They rented an office up at Chautauqua and we knew at some point that may end. So we not only combined the two boards, but we combine the two staffs. And they had a development director and we had a development director and the marketing and all of them became combined. And...That for probably....The first couple of years was very, very challenging because the community music school you have year round...
marketing and everything...The festival you concentrate mainly on a six week festival at Chautauqua. And although that marketing starts early in the year, and you're looking for sponsors and all that, of the bulk of it is not done on a complete year basis. So as time went on and...the staff I think overall worked very well together. We had known each other in various different capacities because the RMCMA had done some educational components with the festival in the summer. At that point it was called classical kids. And so we had had some exposure there. And the idea was to really bring more education into the performance side. And when you ask about the challenge of music education and also getting them to performances, that has probably been the biggest challenge. So I'm not sure how long you want me to go with this particular aspect before the next question, but my role has certainly evolved over the years.

Cody Goetz [00:07:02] Sure.

Stakeholder Eight [00:07:03] Now I'm very deeply involved. I'm the corporate and major gifts associate. So I work very closely with all of our donors...probably as much as the ones on the CMF side as the ones on the center side [CMA]. Some of them cross over. One of the biggest challenges was that there are very strong emotions with both organizations. And when all of a sudden you start to combine the budgets, the marketing of, the staff...everything. It's really questioned as to who is getting exactly what they need at the right time. And so probably one of the greatest challenges being on staff was capacity to really make sure that the needs of both the organizations were met.

Cody Goetz [00:08:08] Thank you. Let's move on to the next question. What do you see are the internal strengths and weaknesses, as well as the external challenges and opportunities of the CMF-CMA organization.
Stakeholder Eight [00:08:25] Well I guess I would say the internal strengths are that over this amount of time, we have become very, very well educated on both sides. Speaking for myself, I have a deep love of just building relationships with people. And it's been a pure delight to meet the donors who have so passionately supported the festival for 40 years, some of them all almost. And yet cultivate the donor base from the people that passed through the center. Of course the families that bring their students here, some of them become longtime donors. But I would say the bulk of them tend to move on. One of the greatest weaknesses internally continues, and always has been, the capacity. We've talked often that would almost be nice if there was a board for CMF and a board for CMA. And the challenge of having equal representation on the board on both sides has been a very, very large challenge. As we bring new board members on, we don't necessarily want to say that their biggest loyalty is to one or the other. The ideal situation is that it's to both. And sometimes that's the case. And sometimes it's not. Of external challenges, I think just explaining to the outside world what is the Colorado Music Festival and Center for Musical Arts. And it was initially the Colorado Music Festival and the Rocky Mountain Center for Musical Arts. Now that's a huge mouthful. And right after the merger we went through...Oh...in depth discussions on name change. And...Colorado Music Festival did not change their name at all. We did drop the Rocky Mountain and it's just the Center for Musical Arts. And that has been accepted, but still when you sit down and talk to someone who's not familiar with the organization. The first question is "so how does that work?" And that's not always easy to explain. We like to say that as we educate people and bring music into their lives, we also encourage them to pick up the performance aspect of music. But I do have to say, even to this day, getting as many of our students and families that attend the center to also attend the concerts at Chautauqua has been a huge, huge challenge. And we always get very creative. We
offer certain discounts. Having Kathy Kucsan back as the education director is absolutely huge. And we do honestly feel like this year there's going to be some real turning points. Because we're incorporating some education components into the festival much, much more than we have in the past. One of the external things that I'm probably very involved in from a development standpoint is finding funding for programs that expose people of all ages, but especially our younger people, to the concerts up there. And we have a partnership with the "I Have a Dream" Foundation. We're working right now to cultivate an intercambio this summer to get some of their students up up there. And so there's a continually ongoing aspect there. We're also offering master classes which we always hope get greater attendance, and we do do some of those through CU as well. We're especially excited about Peter Oundjian, our new music conductor, because he also has a passion for the educational side and we've added, for two years now, We do a program called "It's Musical." That is hosted by the Academy [Academy Senior Living, Boulder, CO] three Wednesday nights before the Thursday concerts at Chautauqua and this has been very successful. We have excellent speakers come and it's just a...It's a way to learn more about the concert they're going to be attending. But it's full of trivia and fun...just very very delightful things. And then Kay Peter is adding an additional event on July 31st and we hope to expand on that as years come. And that also will be at the Academy. As far as opportunities, again, I'm involved from the finding funding and donors who support some of our programs that we offer here at the center and especially our programs for senior populations has been expanded. We're doing a lot more with Alzheimer's. Sound sensory concerts. We have what is called the Spark Program, which we were actually approached to have here through the Alzheimer's. And this is for early onset of Alzheimer's or dementia. But the role that music can
play is absolutely phenomenal. And I personally have a real passion for many of our senior living situations to just bring more music to them. And offer programs.

**Cody Goetz** [00:14:32] Wonderful. So based on your perspective and experience, and you've kind of alluded to this in your responses, how to see CMF-CMA internally collaborate to serve its mission of providing music performance and education opportunities to the Boulder-Lafayette communities.

**Stakeholder Eight** [00:14:53] Yeah, I think I have touched on that quite a bit. I would add that it extends beyond just Boulder and Lafayette. We're doing a tremendous amount to make a greater impact in all of East County. There is a tremendous amount of people that are moving from Boulder and also people that move here that are in East County and I would honestly have to say it's amazing to me how many people have heard of Chautauqua, but don't even know what it is. And the same thing is true when you talk about the center. That "oh that's that building on such and such." But they're not real clear as to exactly what it is. One of the other things that our marketing and development are working closely on is making Boulder a destination. And we're working throughout the Denver metro area. We have a large marketing program going on that will actually be through CBS and 5280 and a lot of other places where we get greater visibility than we've had in the past. We all live in a community where there are so many incredible opportunities. And I think that, especially with our new music conductor, and just the caliber of our musicians and everything...We are an absolutely outstanding orchestra and people need to be educated about that more.

**Cody Goetz** [00:16:30] So, the next two questions are unprepared. Describe CMF CMA values in three words.

**Stakeholder Eight** [00:16:40] Music for all.
Cody Goetz [00:16:46] Can you make three adjectives, for example, so they don't all have to relate syntactically link together.

Stakeholder Eight [00:16:54] Okay. Well I think for both access. Is extremely important. And then the other two words. Now these aren't adjectives but performance and education. We want to... Through access...We have the heartstrings program where we provide tuition assistance to anyone who wants to take music lessons and it doesn't matter their culture, their economic background. We also provide instruments in nine different school districts...so the access over all. When it comes to the festival...That's why we're trying to create, especially through the family concerts and some of them, greater access to people who would not otherwise be able to properly purchase tickets and experience that. Does that give you three words?

Cody Goetz [00:17:50] Yes that's perfect! I love both of the responses, but I'm looking for three words to compare between people.

Stakeholder Eight [00:17:58] OK.

Cody Goetz [00:17:59] What words people are saying.

Stakeholder Eight [00:18:00] OK.

Cody Goetz [00:18:06] Based on your perspective and experience, does CMF-CMA may serve similar constituencies with its summer music festival and community music school and other programs serve different audiences.

Stakeholder Eight [00:18:17] I think the program definitely serve different audiences. As much as we would like to think that it serves the same audiences, I don't think that's really true. I think there is a subscriber base to the festival that is fantastic. And I think that if you looked at the demographics of the people who attend the CMF season tends to be real music lovers. Who they either have for years or they've heard about it. And that's one of the reasons that we're trying to
make Boulder a destination. To get them up here. When you look at some of the festivals like Vail and Aspen and all that, we'd like to look more at not just a stopping off point. I mean there's a wealth of incredible culture and everything available in Boulder. The programs that are at school during the year are mainly geared to students. And we always run into the challenge of what kinds of offerings there is...individual lessons that oftentimes families will take the summer off and not take the lessons through the summer. But that continues to go on. There's the jazz programs and the concert band and those continue. But the summer camp is something that families look for their children. And one of the challenges that we've always had is that a lot of those families want full daytime camps that go on for a week or more. And so we have various different offerings. But when you ask if the audience is how they differ they do different greatly. We're making an attempt to get some of the students attending those camps to [come to] especially like Peter and the Wolf, the family concert this year. And one of our gals Deborah Schmitt Lobis teaches composition and she makes certain that her classes get up there. So it's not to say there's no crossover, but it's not as great as we would really like to see it.

Cody Goetz [00:20:43] I think as a follow up question to that one is it okay that they're different constituencies?

Stakeholder Eight [00:20:49] Yeah! I think...I think it is. I think it's a challenge, but it's okay from a donor perspective. I almost feel sometimes we have so many offerings to present to a donor that "wow, well you could put your money in the festival, and you could put it in heartstrings, you could...our Alzheimer's programs. I mean there's so many things available. It's not just a matter of just an overall donation to the organization, which we absolutely love when people do that. But people tend to have real passions about where they want their money to go.
Cody Goetz [00:21:30] Do you think that makes people more willing to donate. Since there's so many opportunities within one organization to donate?

Stakeholder Eight [00:21:41] I think it depends on their knowledge of the organization and what kind of cultivation has gone in to that. I think Colorado Gives Day is a classic example. There are people who on Colorado gives day who just give to organizations so they will routinely give 100 dollars just to the organization. On our website you do have the opportunity to sponsor a musician, to make it specifically for the Center for Musical Arts, or specifically for CMF, or just general funding. So in a sense, It's...Do we miss out on more donations? I think the cultivation and the education that we give to people makes a big difference...I think an example I always think of: if you want to give to cancer research you're going to give to the Cancer Society. You're not...Specifically saying on this particular kind of thing...but whatever.

Cody Goetz [00:22:51] Sure. Last question. Where do you see the organization in three years?

Stakeholder Eight [00:22:57] Well I think one of the things that is really happening right now is that with our new music conductor, and this has not been ruled out, we're not using the campaign, but moving the organization to the next level. Peter Oundjian brings incredible...Not just experience and his reputation and all, but it is opening up doors in communities and donors that we have not been able to tap. One interesting concept, and, I'm personally working on this, Is that to get into various different communities, be it the Jewish community or whatever, we have more opportunities I think in those areas than we possibly have had in the past. It also, I think, taking it to the next level with the kinds of education we're doing is huge. For the Center, where we see this in three years, we would like to see the level of the programs offer here come to a brand new level. And so much of this comes in working with our education director. And it's on track to do that. It's just...It doesn't happen overnight. And any time you introduce a new
program, we always find that it takes a year or more to really get, not just this support, but get the people who want to be involved in that program. We have way too many visions, but how do we really put those into action.

**Cody Goetz [00:25:12]** Okay, well thank you so much for sharing. I really appreciate it!
Stakeholder Nine

Cody Goetz [00:00:03] Thank you so much for being willing to speak with me about the CMF-CMA. The first three questions are going to be some prepared interview questions and the next three will be on the spot responses. So the first question describe your story with the CMF-CMA. For example, describe how you first became involved with the organization, how your role has changed, and what it looks like as of today.

Stakeholder Nine [00:00:36] I got started in the summers attending the free rehearsals [of the CMF Orchestra] at Chautauqua. I was an empty nester and a teacher, so my summers were empty, and it was so fun to go up there with a thermos of coffee and just listen. And I started to realize that I really want to know these people...I wanted to know...they come every year...they are so impressive and I'd like to be in their crowd...I wanted to be one of their friends. Quite by accident, I was asked to get involved with a group that still exists in CMF, called the Friends of the Colorado Music Festival. It was really important in its earlier years. Those women did everything. They planned all the galas and made all the decorations and sent out all the invitations and stuffed envelopes and it was a great old time. But by the early 2000s, the whole scene had changed and they were losing friends. And so I was asked by the then president of the board, T.K. Smith, myself and another person were asked if we would come and if we'd be interested in heading this [Friends of the Colorado Music Festival Society] up and see what we could do to make it up to date or get more people. The other person didn't last very long. I worked at it quite a long time, and the bylaws of the Colorado Music Festival state that the head of the Friends must be a board member. So I found myself on the board...Just about my first board experience. So I joined the board in 2008. As a result of that, I was then asked to be the
chair of the Governance Committee and oversaw a revitalizing of the bylaws. And then I was around when Michael Christie decided to move on after 12 years [in 2013], which was...should've been expected even earlier than that. But he was disgruntled, and he made no secret of that. And the entire board became very disgruntled with the executive director. And then she recognized that she was not working in a very positive environment and so she also left. And that meant we had no music director and no executive director. And by that time I'd become president of the board and I had to run the whole thing for three years...and that was very difficult. That was very difficult. The two organizations had merged already...the merger was in 2009. I hadn't gotten too involved with that because I was in charge of the Friends and I was as we always said, I was a "festival person." I was interested in the school, but I didn't do too much with it. So then I'd find myself running a merged organization that hadn't merged very well yet, and a lot of rancor and dissatisfaction everywhere and a search...two searches: executive director and music director. So, we're in such a better place now. We have this great executive director, who said yes the second time we asked her, and Peter Oundjian staying with us as artistic director, a smaller, active board, as far as I can see, no arguments or rancor or fighting with each other. So it's in a very good place, which is why at the end of 10 years I went off that board last December.

Cody Goetz [00:04:48] December 2018?

Stakeholder Nine [00:04:50] And that made it a full 10 years I'd been on.

Cody Goetz [00:04:53] Okay.

Stakeholder Nine [00:04:54] But, I still...I took on volunteering three hours a week in the office here...they needed someone to keep track of all the instruments that are rented out...it is especially helpful for writing grants...how many instruments do we rent...how many instruments
do we rent to people who need financial assistance. And no one was doing it, so I volunteered to keep track of the instruments and I'm still doing that. But then, I guess other than that, I am a board member emeritus or something. That should be my history.

**Cody Goetz** [00:05:36] Thank you so much. Moving on to the second question. What do you see are the internal strengths and weaknesses for the organization, as well as the external challenges and opportunities of the CMF-CMA organization?

**Stakeholder Nine** [00:05:55] The strengths is that both of the things they do, performance and education, are of a very high caliber. They are both excellent quality and that's been true all along. Both of them also have a lot of heart. The musicians that play every summer have so much heart to keep coming back here and doing it, because they do love to do it, but they have great heart and CMA has always had a wonderful heart...loving music and loving people playing music, so those are the same...so those are the strengths. Another strength would be they're constantly searching for how to combine the performance and the education. It used to be a fairly simple thing. The festival orchestra would do a children's concert and it usually would involve all the winds wear red and all the different colors...and the kids in the audience would learn something...sometimes it was a play. But that was it. They did also start some talks, where before a concert someone would talk about the music and they also tried masterclasses. Back when it was just an orchestra though, they had a hard time publicizing the masterclasses so that a student of violin would come up and work with a professional performer. They just had a hard time pulling those off, but they tried. And CMA has always worked very hard to provide performance opportunities. But since the school's been busy keeping everybody in the right class and offering a variety of classes, they didn't have the time to go up and try to find a place to take a group of kids to perform anywhere...so they've both been trying and there's...It sounds like this summer
there's going to be more than there ever has been, and that's due to the fact that all the dust has settled and the hubbub has died down and they now have time to actually think about how can we do this. So there's going to be more of a presence I think up at Chautauqua this summer...So those are the strengths but the difficulty has been...it just has taken a long time.

Let's see...that merger was in 2009. And despite everyone's best intentions and expectations, there was not an instant glomming together. It stayed very separate. There was some resentment on both sides. The people who performed in the orchestra automatically assumed that if we were out of money it was because we pouring all our money into the school, and everyone at the school always felt like all the attention was...I mean it was just...there was just...resentments...it was just like when you know family has another baby or something. It's just taken a long time, but certain personalities have helped get that to where it is really good right now. It's really good right now. Liz is so wonderful about acknowledging that there's two entities in this organization and the problem with the festival people is if they aren't teachers themselves, or if some of them never took a lesson, they just don't really know what's involved and Liz does because she was a performer, but she also just has an open, welcoming nature and then the other key was finally the old resentments had died away and Kathy Kucsan has come back into the building to do what she does professionally now as the music education consultant and she has found that the atmosphere is positive enough that she wants to continue pouring herself into it. So we're in a better...It's been much better now, but it's...It's not a natural fit. Everybody thought it was so natural, but here's what they would say "oh this is great!" People from the music festival will go out to Lafayette and listen to recitals, or...I don't know what all they thought they would do...And they also assumed that all the parents of the kids taking classes they'll come up to Chautauqua and buy tickets. And it didn't happen...didn't happen at all. And then everyone
was sort of stuck with "what now do we do?" And unfortunately all that mess happened in between, you know I'm trying to run things, we hired one executive director who then backed out with a signed contract. We hired another executive director who was not a good fit and fortunately left. So when we needed to have the right people here to get that done...and Liz was really good for that. So it's really a challenge to think you're going to...maybe if they're all in one building it be easier, but being, what are we... 11 or 12 miles apart or something? It takes a long time. The people once they get into Boulder they think it's horrendous to come out here and people out here think it's horrendous...It just...It didn't fit as naturally as everybody thought it would.

**Cody Goetz [00:11:52]** So, I appreciate all that information, but I'm hoping we can kind of circle back to what one of the internal weaknesses might be.

**Stakeholder Nine [00:12:03]** Well the internal weakness would be a tendency, if you're not careful, to automatically split it up again. We're a music festival and a school and never the twain shall meet. Some caring person, now I think it's Lisa Vass, I tried hard for a long time, try to keep it in front of everybody's face that we've got two different organizations, but...The weaknesses you just sort of fall back. The CMA people sort of fall back on CMA and the CMF people sort of fall back on CMF. Another salient example is they decided they needed two fundraisers when we used to try to have one somebody felt, "we can't have two!" Well it turns out, yeah, you're better off having two: have one for school people and have one for festival...And so is it turns out, in order to keep the organization running more cohesively, you do sort of have to separate a few things out...so the weakness would be still trying to find out where that is and accept that it's not two separate things and it's not really one whole
thing...That's not a done job. I think that would be the weakness. Seriously. Because right now, you've got people who care about all of that and are working really hard on it.

**Cody Goetz [00:13:43]** So what are some of the external challenges from other institutions or opportunities for the organization.

**Stakeholder Nine [00:13:53]** The challenges remain. Well not just with the two. I mean it's still a challenge to try and get families or students at CMA to go up to CMF and hear a concert. It's still a challenge even though they've been given all kinds of freebies and incentives. It's still a challenge to try and...somebody that's here for piano lessons is probably not necessarily interested in going up and hearing something. So that's a challenge. And it's even harder to get someone who's been going to the Colorado Music Festival for 42 years to care at all about the fact that people are learning music out here.

**Cody Goetz [00:14:43]** So moving on, you kind of alluded to this but based on your perspective and experience how does CMF-CMA internally collaborate to serve its mission of providing music performance and education opportunities to the Boulder-Lafayette communities.

**Stakeholder Nine [00:15:01]** They've always had that in their minds is something they should be doing. And then very...whoever was in charge of anything would try and then probably get bogged down with something like a rental agreement or angry musicians or looking for a music director or a music director that didn't get along with you. I mean there was just so many distractions, but everyone has always been aware that we need to...It wasn't exactly everyone but there's always been a voice on the board when something was being discussed in the handbook. We need to remember how we deal with CMA on this, and they would be labeled "school person." They got interested in the organization from here and they've come and gone and when I was on, people really knew that I would always remember that we were two because I just was
there. I tried to give birth to a little thing. People are often aware of it, but it was trying to keep, um, a focus on managing the two of them, it sometimes has just fallen by the wayside because of time. It really feels to me now, due to the fact that things are smooth and Liz is effective, and Liz doesn't ever forget it, that more attention is being focused on the new music director Peter is much more...I think everybody says they're interested in education, but Peter's interested enough to think about and talk about doing something about it and not just come out here for a cocktail party and then leave. So we have individuals who don't ever forget that that is what we're trying to do, and fortunately, due other things, have enough time to really keep thinking about it. It's never a done thing.

Cody Goetz [00:17:09] Alright. Thank you. The next three questions are unprepared, on the spot. Describe CMF-CMA values in three words.

Stakeholder Nine [00:17:21] The values of the organization in three words?

Cody Goetz [00:17:23] Yes.

Stakeholder Nine [00:17:26] Well I think I've already used two of them. One is excellence and one is heart... what would the third one be... the values...excellence...heart..I guess it's just too prosaic to say music...umm...has to be one word...So I'm going to try and figure out a word that means in the place that you are trying to be true to your unique self. I guess that's true of integrity, but that's hard to know. Let me see if I can come up with a better third word for...trying to...In Boulder...trying to keep CMF- CMA alive well known and keep it up with the times. So let me think... Pardon me while...

Cody Goetz [00:18:23] That's okay!
Stakeholder Nine [00:18:25] I need a word for that. I didn't really like integrity. I don't really like self-awareness. Plus it's two words...it's got a hyphen. So awareness I think...I'll use awareness.

Cody Goetz [00:18:43] Awareness.

Stakeholder Nine [00:18:44] Yeah. Especially since the disabled music groups is downstairs. Both organizations really try to keep that kind of thing in mind so though...those would be my three.

Cody Goetz [00:18:54] Sure. Thank you. So you've also kind of alluded to this question but based on your perspective and experience, does CMF-CMA serve similar constituencies with its summer music festival and community music school or do the programs serve different audiences?

Stakeholder Nine [00:19:11] Yeah they definitely serve different audiences...I think people are starting to finally realize that and deal with that. There was just this beautiful dream that it was all the same people...and it wasn't...so different audiences.

Cody Goetz [00:19:37] And I'm just going to ask a follow up question. Do you think that's okay?

Stakeholder Nine [00:19:43] I look at that as a result of hard painful experience that comes...Acknowledging that there's two different constituencies is a relief and the truth, because we really tried to make them the same. And it led to great difficulties...struggles...lack of progress...resentments...confusion...and I think we've come from the other side and realized, you know, we are one organization, but we have two different things that we do. And it's almost kind of like a relief. Oh good. Let's just keep it that way. I've certainly...because when I hang out here and see the people that are here [at CMA]...they're different. I go to both galas and they're
different...They needed to...and a gala is kind of an obvious thing to use. You know who wants to
dress up a lot and go to an expensive place and bid on big vacations. Lots of people do. But they
are all festival goers.

**Cody Goetz** [00:20:51] Yeah.

**Stakeholder Nine** [00:20:51] Who wants to do something a little bit more laid back, much more
moderate in price and a little bit more fun? Well that's the CMA people. Two consistencies,
yeah.

**Cody Goetz** [00:21:04] And my last question. Where do you see the organization in three years?

**Stakeholder Nine** [00:21:09] Very strong and tight and organized. Really good people for
that...and keeping up with the times. It's hard for them all, but they've kept up with you know
social media or whatever they need to do. The heart will still be there, because that would have
been destroyed already if it was going to be destroyed. And possibly at the end of another three
years...more people will be vaguely aware. The people at CMA will remember, "Oh yeah, they
do concerts in the summer too." And the people at the festival will remember, "Oh yeah, they
have a whole school in Lafayette." There will be more of...Everybody will sort of know about it.
Whether they participated or not it would be more an accepted thing.

**Cody Goetz** [00:22:15] Okay.

**Stakeholder Nine** [00:22:16] That's it?

**Cody Goetz** [00:22:20] Yeah that's it.

**Stakeholder Nine** [00:22:22] Well I knew it would be easy.

**Cody Goetz** [00:22:24] Thank you so much for sharing!

**Stakeholder Nine** [00:22:25] Sure!

**Cody Goetz** [00:22:27] I really appreciate that.
Thank you so much for coming to speak with me about your involvement with the CMF-CMA. So the first question that I'm going to ask you to describe your story with the CMF-CMA. For example, describe how you first became involved with the organization, how your role has changed, and what it looks like as of today.

In the summer of 1997, my lady friend, much later to become my wife, dragged me to a CMF concert. I had never been to a CMF concert. I had never been in the hall at Chautauqua, and so that's how it all started, and it's become a significant part of our life post that introduction. She was a much bigger fan of classical music, and I had some exposure, but I was more interested and kind of just easy-listening stuff and the typical stuff you do in high school in the 50s and 60s. About 2000, maybe 2001, I don't remember exactly, I got a phone call at my office asking me if I'd be interested or would entertain becoming on the board of CMF. I said, "Gee I don't know." They were looking for somebody with a little bit of financial background, which is what I was doing for Edward Jones. So I went home and asked my wife, "should I join the board of CMF?" She said, "Oh by all means of course!" And so I did, and it was just a learning process of how the board operated, and I had been on other non-profit boards, but not in an area where I knew so little, which is about the music, and I've never played an instrument. Interestingly, my wife really hasn't either or a little bit but...

What's your wife's name?

Her name is Constance Holden. So, I became a board member, pretty active in the development side, because it's such a crucial part of this...particularly...is not all non-profits, but specifically classical music non-profits suffer from a rather abysmal business model. I became president I think in 2008. So I was president in 2008-2009 and I think that...
I know that's when we merged with the Rocky Mountain Center for Musical Arts. Lots of debate, lots of differences of opinion... We had a couple of people quit the board because they thought that was...would make us less focused. I had my arguments were one: we had too little attendance from the East County. This would give us some visibility in the East County. Secondly, I had been told and it made sense to me, that a lot of the people who attend classical music concerts have grown up playing an instrument. There are some exceptions, like myself, but a significant number and we needed to have a link to those people. Thirdly, I thought by having an education arm, we would be more effective and successful in fundraising. People like to give to kids and not that...the Rocky Mountain Center was all focused on kids because they have a lot of adult taking lessons as well. And fourth, and pretty and still quite significant, we are a beneficiary of a SCFD, you know about that?

Cody Goetz [00:03:46] Yes.

Stakeholder Ten [00:03:46] And so is the Rocky Mountain Center for Musical Arts and we were a tier two organization which is a pretty significant chunk and if we...Because the threshold continues to move up, if we weren't have more financial bulk, we would fall into tier three, which is maybe twenty five thousand dollars a year versus roughly one hundred and fifty thousand dollars. It's based on our ticket revenue. There are some small adjustments to have the donations people out of pocket donations for CMA it includes the lesson revenue and it includes donations. There's some other small modifications something...some items that don't qualify for SCFD, but SCFD as you know seven counties, sixty five million dollars. Tier one scrapes off most of the money, but Tier two is pretty significant, and we get one hundred and fifty thousand dollars and with a two-million-dollar budget, it's not trivial. And then...subsequent to that, I don't know maybe three or four years later, it seemed to be time for me to step away from the board,
which I did, and then I got persuaded to come back on the board when we started this million
dollar campaign--our fortieth anniversary--and I'm still on the board.

Cody Goetz [00:05:17] And that was in what year?

Stakeholder Ten [00:05:19] Ahh, 2017. Three-year campaign to raise a million dollars, and we
just barely got over the million-dollar mark. So we feel pretty good about that. We had one major
contributor that was a huge help, which is often the case. So that's pretty much my history...as I
say I'm still on the board, but it's time for me to step away and let other people have all the fun.

Cody Goetz [00:05:55] And then when you were on the board did you have board term limits?

Stakeholder Ten [00:06:03] Informal but never enforced. I mean we have people on...Carol
Kassoy probably been on the board for thirty five years...I don't know. Chris Mueller...same
thing... We talk about that...We worked up to revise the bylaws, but we've been lax.

Cody Goetz [00:06:31] Okay. So next question. It's got multiple parts, so if we circle back to it
that's okay. What do you see as the internal strengths and weaknesses as well as the external
challenges and opportunities of the CMA CMA and organization?

Stakeholder Ten [00:06:49] Well certain in my mind an internal strength is the small cadre of
dedicated people in each part of the organization. And it's too small, which it then becomes a
weakness. And that's frankly, I think, in many non-profits too easy to let a small group of people
do most of the work. And I'm a big believer boards should be involved in fundraising.

Everybody. You don't have to do the ask, but you have to cultivate people and develop their
interests. And we can find ways to ask or do the invitation to be a contributor. Most of the arts
through all of history have been supported by patrons of one kind or another for two thousand,
three thousand years so why should this be any different? So the strength is the dedicated
people...the weaknesses...there's too few of them: whether it's lovers of classical music or people
who strongly believe in the role of music education and what it does to develop young people. And I tell you, for somebody who's never taken a lesson, and not about to start now, to go out to the school and sit there and watch these kids doing their homework as they get ready for their lesson. I mean it's impressive. These kids are focused. These kids are not going to get in trouble. They got too much on their plate; they're too focused, too dedicated. It's wonderful to see. And from that standpoint, I think we make a pretty important contribution to the community. And the fact that we have, as you probably know, scholarship programs for people who don't have the income. And last year, I think, we were doing...and we were working with 20 "I Have a Dream Foundation" kids...dreamers...who are all from lower income families by definition. And the whole instrument bank and loan instruments, either free or at very reduced rates, to kids in 20 different schools. It seems to me we're making a great contribution. External challenges. Frankly there's too much classical music around here. Starting with your university, Cody [University of Colorado Boulder]. When I moved here 20 some years...twenty-two, twenty-three years ago, there was very little...Boulder Philharmonic was in existence, but there wasn't any Boulder Symphony there wasn't a lot of this other stuff. I think there was a Bach Festival, but that's very focused and narrow not even sure about the Mahler fest, but the free concerts and recitals that are done at the university...And when I moved here, or when CMF started, let me go back further, I think Aspen maybe had the only classical music [festival]...any place in Colorado. Now almost every mountain town has a summer program and Vail has become a big deal that draws people from here. People say "well it's cooler up there; I can rent a place or “I own a place...why wouldn't I stay up there and just go to their concerts?” Which does happen. So that's one real big challenge in my mind. Now not everybody agrees with that. There's so many other activities...Boulder is just a wonderful spot for outdoor activity from biking and running and
hiking and fishing. I don't know all the stuff you do around here. It's pretty easy to not make the effort or generate the interest to go to classical music at Chautauqua. Chautauqua is a wonderful spot, but it's a bear to get to. It's really difficult and we have elder patrons who have just kind of bailed on it. It's not worth the hassle. Again, we do picnics quite often...used to be able to park in the park or drive up drop the stuff off by the Academic Hall set up a picnic and go park the car. We can't do that anymore. It's very limited. So yes, we have The Hop [public bus transportation], but it's one thing to ride The Hop going because you're...from downtown as well as twenty seventh way, so that's pretty convenient. But after the concert, then you have to wait in line for The Hop because there's only so many buses and only come so frequently...they do come up to the top, which that helps, and some of the retirement homes will bring patrons, but that's...it's physically challenging and that makes it, I think, one of our most significant external challenges...that and the competition. I can't speak so much for CMA from a challenge standpoint, other than people have a limited amount of time, and we're mostly teaching kids who are in school. It's always frustrated me that we don't do more with adults in the early part of the day when the kids are in school and we have a near empty facility over there, which considerable money has been put into the remodel, you've probably walked around, so you can see...you probably can't imagine what it was like before, but that's okay, and that's a pretty first-rate facility. Again...challenges our kids have a lot on their plate...A lot of choices...a lot of things to do, and someone want to play musical instruments and we are there to cater to that.

**Cody Goetz [00:12:44]** Yeah. Do you see any external opportunities for the organization?

**Stakeholder Ten [00:13:01]** I guess some might fall in a couple different categories. Because our musicians are only here in the summer, we lack a year round presence and we tried for several years to run some winter concerts to sort of keep us fresh in people's minds. We did those
in the community house, or, I'm sorry, at Chautauqua. They were modestly attended, but they were not financially self-supporting, but I said "that's just part of marketing." We're thinking more about trying to do some shoulder items... We might do those in May or might do those in September. I don't know what's going to unfold there. I think that would be beneficial, but that's all hypothetical. I don't know whether it really would be... Again, because people have so many other opportunities. The Dairy Center for the Arts has become a much more significant player... As a place for people to attend for different arts performances, and it becomes a competition for your pocketbook. People have... Well some people have a limited amount of disposable income. I like to think we should be doing a more active outreach in East County where first of all the population is growing. It's going to continue to grow. And those are our prospects both for CMA and our people who provide the lessons, some of them were grad students here [University of Colorado Boulder]... When they're they would like to work solidly. They don't want any breaks in their schedule. They want to deliver. And of course you have a conflict... Most people who deliver the lessons, the providers, want to be paid more. And yet they want to have us charge less so more people will come in. There's a little bit of a conflict there, but I think we've find a balance... strike a balance.

Cody Goetz [00:15:24] The third question. Based on your perspective and experience, how does CMF-CMA internally collaborate to serve its mission of providing music performance and education opportunities to the Boulder-Lafayette communities?

Stakeholder Ten [00:15:41] Well, I like to picture this organization like you might a company, and almost any company who has two, somewhat non-competitive product lines or non-competitive businesses, but hopefully some synergism because of the nature... And some of it is so different. I'd say there's probably modest collaboration, but where the same or similar skills
can be applied. I'm thinking in the arena of marketing. If you have a marketing skill, you can market the school just as well as you can market the festival, I think, at least that would be my approach. And from an accounting standpoint, if you can do accounting for one you can do accounting for the other...I guess those are a couple of things. Development...how different the development. You have a different product, maybe, to present, but the process of development and cultivation is pretty much similar. I mean if you are good at development you can promote education portion, you can promote the orchestra...

**Cody Goetz [00:16:58]** From a development standpoint a thought just came to mind. Has it been approached to people in the community that this is a unique organization? The product that it provides that you...CMF-CMA is one of the few institutions in the area, let alone perhaps the country that does this sort of thing. Does that draw people in with that uniqueness factor?

**Stakeholder Ten [00:17:26]** We tell that part of the story. I'm not sure how much of an impact it really has. And when you look down the list of donors...it's hard to find very many who are specific to the school. There are some and a couple of really significant ones, particularly the program that underwrites the scholarships. I mean they're very generous folks and the people who gave the money to remodel the building he was...I mean he was an attendee, but he was a big fan of the education side, Glen Korff. Some of the functions are not universal. For example, quite specific, lesson registration, which Nancy Brace does...I mean she's...what she does would not really apply to the festival. By the way, another challenge is the fact that all of our ticketing is done through Chautauqua. We don't have any freedom or flexibility, you've probably heard that part of the story before, and of course the lesson delivery is unique at CMA. I would like to have thought, and one of the reasons we've got connected with them early on, back when Catherine Underhill was executive director and Kathy Kucsan and Peggy were running the
school, we had some linkage back and forth between kids who would come to some concerts. We did some artists-in-residence thing with some of our musicians would give some small group lessons, I think, to some of the kids and they were pretty impressed with the quality of these kids and their ability to play. I mean these were pros playing in pretty significant orchestras. Somehow that hasn't blossomed the way some of us might have dreamed. It takes a lot of work and we have a very small staff, so they have to pick their spots that they're going to work on...And maybe that'll change someday in the future when we're even a more robust organization.

Cody Goetz [00:19:42] What would be...another thought would be...has the organization ever considered having...giving kids from the school the opportunity to perform something with the orchestra as if it was like a concerto competition. Has that thought...Has that idea been thrown out?

Stakeholder Ten [00:20:02] I don't...I think the answer is yes, but I don't know. And part of the limitation, as you may know, from the festival standpoint is musicians still play a huge amount of music in a short period of time. You've looked at the repertoire and in between rehearsals and performance...And the practicing they do on their own... They're probably not looking for much more. Although many of them will play in the Young People's Concerts where we do combination with another group in the Boulder Youth Orchestra. But to me we haven't catered enough to our own students. And frankly there are some festival people who've never been to CMA. They couldn't find the building if you spread breadcrumbs.

Cody Goetz [00:21:02] So the next couple of questions are just gonna be on the spot. Describe CMF- CMA values in three words.
Stakeholder Ten [00:21:23] [Long pause as stakeholder thinks] Joy as in joy of music. [Long pause]. Focus as in focus on excellence both at the student standpoint and at the festival. [Long pause] So probably it'll sound funny...A gift. To play the music is a gift. And to hear the music as a gift.

Cody Goetz [00:23:18] So based on your perspective and experience, does CMF-CMA serve similar constituencies with its summer music festival and community music school or do the program serve different audiences?

Stakeholder Ten [00:23:33] Sadly, I think we serve very different audiences. When we attend the festival concerts, we look around, at least the people we know or almost all from what I would call the "festival side." When we attend events at CMA, when they have recitals or they have performances, there is always some festival folks there. But not everybody, which seems to me if you're going to be part of the organization you need to support it with your attendance. So that's a disappointment for both... At least my wife and I both feel that's a missed opportunity.

Cody Goetz [00:24:21] Why do you think that's different? In the sense that festival people don't come down to...or more people don't come down to CMA?

Stakeholder Ten [00:24:33] You know, I don't have a good answer. I'm gunna guess it's in part. People are busy and they're Boulder centric...narrow-minded Boulder centric. Instead of thinking at least Boulder County wide and Lafayette to some people may seem like a long way away especially when were the other side of [U.S. Highway] 287, which is nonsense. But it's not unlike people from Boulder go to Denver, but very few people from Denver come to Boulder. I mean that's at least our experience from a festival standpoint, and you look at the zip codes on the ticket purchases. And there there are some from Denver, but there are not many. You have to ask yourself if...I mean this orchestra's pretty darn good. When you have some great players from
all over the country come together it makes some amazing music for six weeks. You know probably better music then CSO and certainly the hall is a better place to listen. And I'm not sure how long Central City Opera...I don't know how long they've been in existence, but I'm going to guess that came in after CMF started up, but I don't know. It's just it's another distraction, if you will, or another draw where we need to compete with. I mean we're all excited with Peter Oundjian, and he's got some amazing ideas and a lot of energy, which is great, and lots of connections, so it'd be interesting to see how the next couple of seasons go.

Cody Goetz [00:26:30] Okay, last question. Where do you see the organization in three years?

Stakeholder Ten [00:26:40] That's always a great question isn't it. Well first of all, we have some new young board members that I'm delighted with. And I think they could be the energy, and the new ideas, and whatnot that we need and have needed.

Cody Goetz [00:27:00] What are their names?

Stakeholder Ten [00:27:02] Well Steven Trainor who is currently the president. Anne Beer, and she plays for CSO. She's a violinist. And Steven plays...I know he plays the sax. He may play a couple other things. Plays the piano. I mean he's a skilled person. John Krampf new board member and we've got two brand new people that I'm just getting to know. I don't know what they'll be like, but I'm assuming they came into the organization with some enthusiasm, and wanted to contribute, and we just brought in...we just voted and another new one. So we have three brand new people. So with some fresh energy and we'll be highly beneficial.

Cody Goetz [00:27:54] How many board members are on the board currently?

Stakeholder Ten [00:27:57] I think we have 18. I've always been a big fan of 25 or 30 and people say "oh well 25 or 30..." Everybody has a different circle of friends that they can be cultivating and bringing different concerts or having a picnic with. And if you have 18...Yes
that's better than twelve, but you have to keep people engaged. And that is one of the challenges when you have a six-week season, how do you keep people engaged the year-round? Whereas a lot of other boards...There are activities...There's things going on and we try to accomplish that in part through the festival of dinners, although that's been up-ended a little bit. And just I mean we have fundraisers to do other things, but you're not really very involved from let's say the 1st of October until the end of April, and whereas, in normal orchestras, if that's the right term, you know, they have a season from September to May. So there some regular engagement and that is part of the challenge is how to keep people engaged and interested.

Cody Goetz [00:29:22] Yeah.

Stakeholder Ten [00:29:24] Different folks have different ideas about that.

Cody Goetz [00:29:26] Yeah. Did you...sorry, I distracted you by asking you other questions.

Going back to the three years where do you see the organization in three years.

Stakeholder Ten [00:29:41] Well I'd like...I believe with the new energy and with Peter we have our best opportunity to significantly increase attendance. And once you get people buying tickets that's all along the path of cultivation. They become maybe Artists Fund supports, maybe they become donors of significance. And then of course I always like to remind them to put CMF in their estate plan...It's pretty easy to do. So I think that Peter's energy and the kind of music we'll be playing, and the guest artists will be an even richer experience than perhaps it's been in the last few years. And as you know, we've had sort of a mixed bag of music directors...not with a length of consistent quality people, but you need consistency. And we had that with Michael Christie. We had a lot of enthusiasm people liked him a lot. And I'm hopeful we'll find that with Peter. Peter's a different personality, but he's a robust fascinating personality and of course
hugely skilled. I think his leadership will be really important and I think he'll have us at a healthier stage than we are right now. Then [again], I'm an optimist.

Cody Goetz [00:31:14] Anything else?

Stakeholder Ten [00:31:23] Have you bought your tickets?

Cody Goetz [00:31:26] I have not yet, but I do...I hope to plan to get up there and to see the festival this summer.

Stakeholder Ten [00:31:34] I would think...even for this program [thesis], you have to have a little experience face to face.

Cody Goetz [00:31:40] Yes, absolutely.

Stakeholder Ten [00:31:41] And the same with the school, I don't know, probably you've been out there but...

Cody Goetz [00:31:46] I've been out there, but I haven't...Most of the time it was because of interviewing stakeholders. So it hasn't been to see the events themselves yet.

Stakeholder Ten [00:32:01] But one of the opportunities of course is a robust summer program, I mean...every sport that you can name has a summer camp and it seems to me that's another thing. And we do some, but seems to me we ought to do more. And maybe it's not as easy as I think it's gonna be. I mean...I think about adults taking lessons. I've always wondered why we haven't been able to go to Frasier or Balfour...these retirement homes. I mean these people who have played music still are interested. Why aren't we giving lessons there? Now the CU musicians give some recitals at Frasier, which keeps the Frasier people pumped up about, and these are mostly classical, but not only. But I mean...I don't know, 300 residents there, and I think they fill the room whenever the senior students come. It might be interesting, I don't know if we can...And I don't know if there's any money changes hands there I don't know. I'm thinking
not but I don't know. But wouldn't it be interesting to have some of our better students from
CMA go to Frasier or go to Balfour. But it's easy to dream up ideas.

Cody Goetz [00:33:28] Yeah.

Stakeholder Ten [00:33:29] There's only so much it's time and people have...


Stakeholder Ten [00:33:35] The other thing, I don't you know, I work on housing for musicians.
We have...Well we have 80 basic musicians and we have another 30 or 40 extras, this season in
particular, and many of the musicians...the biggest number stay at CreekSide [Apartments] which
is on the twenty seventh way. I don't know if you where those apartments are...It's a hundred
forty apartments and we'll probably have between 30 and 35. Now some of those apartments will
be a family so a musician with her husband, a cat, and kid will have a two-bedroom apartment
and the musicians housing is provided. That's part of their contract. Now, if they bring too many
or we have some ways that they have to pay for part of it, but it's usually pretty modest. My goal
has always been to have people stay in a host home for a couple reasons. One it saves us money
because the host doesn't charge us. And it's usually air conditioned...everybody's got AC
it's...everybody's got Wi-Fi...not everybody has AC, but everybody has Wi-Fi, but you get to
know the musician on a more personal basis which is an interesting insight into the orchestra.
And my goal is always for those people maybe to become, not only are they are already buying
tickets probably, but become a sponsor for the artists fund for $2500. These are people should
have a natural linkage because they are housing a musician, and interestingly enough, you got
musicians who don't want to stay in the host home even though that some of those houses, you
probably know, are spectacular. I mean multimillion dollar houses down to...well almost nothing
at Boulder is under a million anyhow. But some are older, but still pleasant and interesting
people. Yeah so that was one of my cultivation schemes and I was and wasn't I didn't originated that... If you go way back, musicians just to stay in the cottages at Chautauqua because they were not busy in the summer. Now they're swamped in the summer as their peak season. So this is all had to evolve, and I live in Gunbarrel, CO and we had a musician stay with us for three straight years and it was just...I was working, my wife was working and David he was in our house for three days before I ever met him because I would get up and go to work. He would sleep in. I mean, I would be at work at 8 o'clock. He'd be sleeping until 9:00 because they didn't start rehearsal till 10:00 and he would come home after maybe...and he would go out with his buddies and I was already in bed. Anyway, we had a great time and stayed for three years and it was...I mean that's a long ways. Twenty-five minutes from the hall...trying to get them closer and closer and we have a few places within walking distance for people who've come without a car. Yeah but it's all part of the cultivation and it's a fun thing to do. But I can tell you, it's a big jigsaw puzzle right now...Find out when musicians are coming, do the hosts have the space, are they willing to do it for the whole time or for...We have extras who'll be here for a week or maybe two weeks. OK I'll take a short. I don't want a full season so...To me it's part of our whole cultivation and outreach. The more people who know about us, the better off we are. Tell your neighbors.

Cody Goetz [00:37:15] Yeah.

Stakeholder Ten [00:37:16] It's always a puzzle...how few people really know about CMF, despite the fact that it's 40 plus years in Boulder. And I was one of those people...my first wife and I would have my guess I'd never have gone. Probably eventually would have and we had been a classical music couple of concerts or few back in Michigan. But now this is a totally different immersion.
Cody Goetz [00:37:44] Well thank you so much. I really appreciate you coming and speaking with me.

Stakeholder Ten [00:37:51] I hope it was helpful and that you get at least one new idea.
Stakeholder Eleven

Cody Goetz [00:00:01] Thank you so much for coming to talk to me about the RMCMA. The first question will be describe the founding story of the RMCMA. From the point of the organization's conception to the end of its first operating year.

Stakeholder Eleven [00:00:21] Well, some of this you probably got from Kathy, Kathy Kucsan and I, she's the other co-founder, we met as grad students here at the lovely College of Music and that was in January of 1993. We were both in the music education grad program-she for a Phd, me for a Masters. And we got to know each other because we each taught a section of Music for the Classroom Teacher, which was for general and elementary ed majors. We were both headed in very traditional tracks. I was going to go back to the public schools and she wanted to be a university music professor in music education. But as graduate students are wont to do, we had time for many philosophical discussions and then we started talking a lot about how even though you...teachers have some autonomy for what they do, they still need to operate under the philosophical framework of whichever institution they're at. And we started talking about problems with that and problems with sort of traditional music education framework, and we both believed very strongly in the sheer joy of music making and that it was that music was something for everybody regardless of age or ability or any of that...backgrounds. So Kathy was from Pennsylvania, and she had been exposed to this community school concept...I think primarily through the Philadelphia Settlement School and she told me about visiting there and kind of just...what it was like, and you know walking into a building and seeing toddlers and grandmothers and sort of a sort of chaotic atmosphere, but definitely a joyful type of energy...and it was very intriguing. So one day we were talking and she kind of half jokingly said "Why don't we start our own school?" And it...just felt...that felt electric to me like "oh wow!" well because I
hadn't even considered it, but it was like an automatic yes. And then I was thinking about the years that I had spent before going back to grad school where I was working in a series of business-related jobs, human resources, and how that could actually be really applicable here setting up our own thing. So, we spent a lot of time, lots of conversations, visioning and talking about what kind of a place we wanted to create. It somehow almost already seemed to exist. And we spent about two years doing research into this kind of school and determining whether or not we wanted to be a for profit or a non-profit, and decided that since access was a big component of what we wanted that we would go for the nonprofit model so that we could get grant funding and people could, you know...

**Cody Goetz [00:04:23]** This two year period was between 1993 and 1995 would you say?

**Stakeholder Eleven [00:04:29]** Yeah. Ninety five was...like May of ninety five, which I'll get to in a second, is when we officially got the IRS determination to be a 501(c) 3. So yeah, 93 through early 95. And so we were we created a business plan. We talked to all kinds of people including, you know, lots of musicians and teachers we already knew from here, which was great. And we were fortunate in that we knew a lot about other schools in the area, Boulder Phil Academy and things like that. And we formed a public school music teacher advisory group, so that we wouldn't be running up against this "What are you trying to do now?" We wanted it to be a very open process and get their input, and to make it clear that we weren't trying to compete with what the public schools were doing, and we absolutely supported what they were trying to do and we wanted to enhance what they were doing. And from the beginning, and then this only grew stronger with the actual experience, we believed that the "what" and the "how" were equally important in terms of both the product and then the experience of it. So that was always an important thing. We knew we wanted a quality excellent product. Of course, you have to have
that. But then "how" was a key piece of it. And we think that's what kind of made us so different.

We formed a small board, you know, mainly family and friends when you first get started, drew up the required paperwork, and because we didn't have a building initially, we planned to offer programs in...and be kind of a mobile thing and offer workshops and classes in places like rec centers, community centers, churches and that kind of thing focusing on East Boulder County. I had lived there since Steve and I moved to Boulder and Boulder County, and it was clear that the people that lived in Lafayette and Louisville and were tired of always having to go into Boulder and Denver for everything. So we thought that would be kind of a strategic decision to focus on that...on East County. We had an initial fundraising concert to get some seed money in early 1995 and then in May of 1995 we received the 501(c)3 designation from the IRS. We attended the National Guild [of Community Arts Education] conference in the fall of 95, and that was in Minneapolis, and we got to visit a few community schools in that area, and get a feel for how different they could be and the different models, and so that was really a good thing. And then we had a couple of angel investors who came along. Actually via a friend of Kathy's. And they believed in the concept of a community music school. And as an investment, they purchased a small church in Lafayette...and then we went through a public review hearing with the City of Lafayette to change the usage of the building to a music school. And actually... And they let us be in that building rent free for two years, which was incredible. You know, that really helped us really get going. Um...

**Cody Goetz [00:09:00]** Was this at the canyon street?

**Stakeholder Eleven [00:09:02]** Cannon.

**Cody Goetz [00:09:02]** Cannon?
Stakeholder Eleven [00:09:03] Yes 111 West Cannon Street. It was a 1907 building. And so then we went through a renovation project that local businesses backed us for materials and we had lots of volunteers...lots of volunteers doing the labor. And after that we opened for our first term in the fall of 95 and we had 13 students. It was very exciting. By the end of the spring 1996, no. Did I say 96 or 97? Fall of 96 is when we opened, sorry, getting my dates wrong. By the end of the spring term 97 we had 100 students. We offered private lessons, small group lessons, early childhood classes. Middle school honors orchestra that was taught by one of the public school orchestra directors out in Lafayette. We started a community chorus and band and then we started to offer a few public concerts very affordable. Kathy and I worked free for two years in terms of the administrative work. We only were paid for our teaching. The first year's budget was something like $45,000. And we started getting a few modest grants and at that point but that...So that pretty much takes us up through the first year. Anything else?

Cody Goetz [00:10:50] No, I think that's great. And then second question, what are three value words that you would have described RMCMA? I guess throughout the organization. I don't know if they would have changed, but I'm kind of looking as like through the whole period of its existence. What would those three value words have been?

Stakeholder Eleven [00:11:16] Well we had like four words that we always used out in the community: excellence, access, community, and heart. Our vision was "Music for All for Life." Value...when I think about that it might be...you might be looking for more like "trust" and "integrity" and or are you or what...

Cody Goetz [00:11:38] Actually what...what I say with value words is, you know, what you would describe, you know, the organization, you know, what are the values I think access excellence and community...those are values that you're holding.
Stakeholder Eleven [00:11:55] Oh, okay!

Cody Goetz [00:11:56] So I think exactly what you're talking about is what I'm looking for.

Stakeholder Eleven [00:11:59] All right. Well that would be it. And, you know, when I talk about the “how” piece of it. That's what I'm talking about. Very conscious focus on things like trust, integrity and respect. You know that type of thing. The actual mission was "quality, creative music-making opportunities for people of all ages, abilities, cultural backgrounds, and financial circumstances."

Cody Goetz [00:12:31] A mouthful!

Stakeholder Eleven [00:12:32] Well that's, you know, grant writing.

Cody Goetz [00:12:36] Oh yes. So how would you describe the organization's development and expansion, you know, starting from that 1997 term up until about prior to the merger.

Stakeholder Eleven [00:13:00] Well for a number of years, I would say we added about 100 students a year. That small church was becoming too small. And then one of those angel investors partnered with someone else to...Well another church, I guess we have this history of converting churches to music schools and this other church, which is the current location 200 Hundred East Baseline, that was the former Methodist Church in Lafayette...that became available and it was over four times larger. And that was an amazing thought of being there. And so, you know, we talked about it and we were prepared to take over something...these angel investors we thought were going to just put down the down payment and then we were going to take over the mortgage and we were prepared to do that. Then the night before the closing we discover they just purchased the building outright.


Stakeholder Eleven [00:14:14] So that meant...I mean.
Cody Goetz [00:14:16] That's huge!

Stakeholder Eleven [00:14:17] It's huge. And so these things happen! I always tell people that are getting started with some dream like this...you just never know. You know these things do happen. So. But that allowed us to put our resources into the program instead of overhead. It was huge. So while then...then we had a big ole capital campaign, fundraising push to get cash and in-kind support to do that renovation...to convert that from a church to a school...

Cody Goetz [00:14:59] And when did the angel donor or what year did they put that down?

Stakeholder Eleven [00:15:05] I think it was 1999.

Cody Goetz [00:15:05] Okay.

Stakeholder Eleven [00:15:05] Because I think I was...I didn't go back and look...dig up the details, but I seem to recall that we opened in that location the fall of 2000. So that's...that renovation had to have been happening during 99 or part of 99. So and then moving forward, we kept adding students...I would say the biggest student numbers were in 2007 or 2008. We had about 800 students at that point. And then...so the model that worked for us was to just develop really solid authentic relationships with all these various constituencies. And we found that if we did that, the money followed. The financial piece worked if we were focusing on these relationships with students, faculty, staff, parents, audience members, donors, general community partners. You know, it's not just a theory. It was something that really worked...during...I would say this was a very busy 10-year period. We were discovering that, yes, the product was...the quality product was crucial and a given...you can't have a stinky product...you can't last. But we never planned on the extent to which community was being built through music. That ended up being just a giant thing. That was the real story. People were feeling connected, they were finding community there. They felt like they belonged. And that
was a big deal. So we were welcoming to everybody regardless of talent or ability to pay or whatever background people had. We developed the Heartstrings Program, which was tuition assistance to anyone who needed it. It was a trust-based system. There was no paperwork. There was no background...Let's see your tax returns...you know...any of that. It was completely trust-based. It also included a 200-piece instrument bank of string and wind instruments. So...and that was for a very low cost so that kids in their school band and orchestra programs, who otherwise wouldn't be able to participate could do so.

Cody Goetz [00:18:07] And those were they were donated from music schools or community members?

Stakeholder Eleven [00:18:11] Donated members from community...yeah. We got them from all kinds of places, we got some grants for some instruments from Mr. Holland's Opus, and some of those grant programs so that instruments we needed that we couldn't readily get as donations, like some of the Suzuki String Instruments for example, we got a whole...Like 20 Suzuki guitars and things like that through some of those grants. The Community Concert Series started to become very popular, with very high caliber performers in all styles and genres. That was something that was always important...we thought was to offer a variety of styles. We only charged five dollars for admission. We always had a strong connection here to the CU College of Music because of our personal connection and so many of the artists and faculty would come from here. We had lots...we had mostly grad students from here who were faculty. That was a big deal...The focus was...Holding the faculty in the highest esteem and paying them as large a percentage of the tuition as we could. During this period, I would say, in terms of budget, our earned [income] to contributed [income] ratio was 70:30, so 70 percent of our budget was earned income, 30 percent was contributed. And so that made it easier for us to weather some of the
difficult climates as opposed to some places that were more 50:50. I would say that during this time we built an excellent reputation in the community, and also had a good reputation among funders, and that our annual operating budget pre-merger was above $650,000. We were, as we could, always increasing the development of the staff infrastructure. I think we probably had around 13 staff members. They were not all full-time, of course. Around the time of the merger talks, we had 650 students I think because we had a drop off after that financial downturn in 2008. Our students were six months old to 80 years old and we had 40 faculty, and then the only other thing I would say is as with almost any other non-profit arts organization building the board was always a challenge. It's just kind of been a given.

Cody Goetz [00:21:28] Going back to the faculty, do you remember that the pay ratio between the value of a lesson. How much percentage should be going to faculty versus program overhead?

Stakeholder Eleven [00:21:43] When we first started, we gave them 80 percent. I think then we...we were always trying to...every year we gave them a raise. If we...and we kind of had developed...Every other year...ever one year they would get a raise for individual lessons, the next for small group lessons. So, we were trying to keep upping it. You know we knew...It's obvious that when you're teaching in a place like that versus going out on your own, you're going to technically make less per hour. However, you know, there are lots of things that community schools can do for teachers that they can't do on their own. Of course the space and the marketing and worker's comp and other benefits...also just being part of a valued institution. And they built their own community there as well. So...that was always, I mean...we wanted to keep getting them higher and higher pay. I think by the time of the merger we were paying them more like 70 percent tuition instead of 80.
Cody Goetz [00:23:30] So tell me more about...describe the collaboration between the RMCMA and CMF. How that began and the relationship that you had with CMF staff.

Stakeholder Eleven [00:23:41] Yeah. I wish I could remember the year, and maybe Kathy did, that we began collaborating with them, but it was a summer program called Classically Kids and these were workshops for children that were based upon the CMF artists and orchestra and the repertoire for that particular season. So, it was, you know, trying to engage these kids and of course thinking that was also going to engage their parents. That was the theory. CMF was interested in us because we had the music education expertise both in terms of knowing developmentally what you can do with certain groups of kids and also then presenting knowledge...how to teach. We also had this presence in the East Boulder County, which I think was appealing to them and we had a good reputation. We were honored and flattered to be associated with them because they'd been around for about 30 years [in the 2000s]. They were considered to be the premiere classical summer music festival...local summer music festival. I would say we generally had a cordial and good working relationship, although at times...we did get some things questioned because...when we were setting up these workshops and looking at the money part of it, it was always you know "we want as many kids as we can get" and "why do we have to separate these grades?. Like why can't you just put them all in there together?" Why do you need an early group and then an older group?" There was some of that going on and so you know lots of explaining...

Cody Goetz [00:25:52] Why that is necessary.

Stakeholder Eleven [00:25:54] Do you want them to have a good experience?

Cody Goetz [00:25:57] Yeah, exactly.
**Stakeholder Eleven [00:25:59]** Oh and also the CMF executive director Catherine Underhill. She also served as a consultant to us because she consulted with lots of nonprofit arts organizations in Colorado. So a couple of times we hired her to do a board retreat and stuff like that. So we knew her in that way. And then later she served as a board member for RMCMA. And you know, hindsight, when I think about that...that was a couple of years before they approached us for the merger. She was probably doing some research and due diligence and that makes sense.

**Cody Goetz [00:26:49]** So now we've gotten to the merger part. I wonder if you describe the merger proposal in the framework that was offered to RMCMA and how were stakeholders, particularly on the RMCMA side, engaged with the merger process.

**Stakeholder Eleven [00:27:10]** Okay. Well I would say at least a year before the merger, Catherine approached me for a meeting to discuss and explore the idea of us having a more formal...our organizations coming together in a more formal way. And although she kind of gave a cursory reason at the time, in hindsight, things I know, that have been revealed that the primary reason they came to us was to ensure that they could stay in Tier II SCFD. So, mainly for financial reasons, you know, and to ensure overall budget level especially during the year when they weren't operating as the festival. Anyway, but we were honored and flattered. We admired and respected them. We maybe naively assumed the same. The initial discussions centered around what would the benefits be for both organizations. For CMF, as a summer only festival, they would gain more of a year-round presence. They would have more visibility in East County. They wouldn't have to be as concerned with their own educational component if they were merging with a primarily education focused organization. The fact that RMCMA had its own real estate was a nice thing. CMF only rented space at the time at Chautauqua. For the RMCMA,
we could gain increased exposure and credibility as part of an older, more prominent organization. We both saw crossover programming opportunities between our faculty and students and their orchestra and guest artists. The idea was that we could have more impact together rather than apart. Personally, I was at a place, as the remaining staff founder...Kathy had left. She was still doing contract grant writing for us, but she had left the staff and gone off and formed her own consulting thing. So, I was the remaining founder and I had been experiencing some fatigue and frustration...mainly with the fundraising threshold we had hit and with the board. The board always deferring to me, which is common when there's still a founder around...it just is. Instead of them taking ownership. They're the ones who have legal and fiscal responsibility for the organization. I was finding that to be a challenge and it was pretty tiring. So, I kinda felt like we needed to do something bold to kind of get out of the inertia we were in. And, you know, to get us to the next level basically. Both organizations, I think, saw the opportunity to broaden and deepen our donor base. Catherine and I had some discussions about if we merged what would the framework look like in terms of management. Would we have two executive directors, two co-executive directors one for the festival and one for the school. At that time, in my fatigued state, I...to me, I thought it would be wonderful if someone else could be primarily dealing with the board and that development piece of it. And I had been getting further and further away from the faculty and I wanted to get back and focus on making the school the best it could be and focusing on curriculum development, faculty development, and we had an ultimate goal to become accredited through the Guild. So, I said, "I think you should be the executive director" and we decided I would be the education director for the organization. So, in running the school and also the education programs for the festival. Again, in hindsight, I think I made a big mistake, because I basically...as it played out, I basically relinquished control over
some key areas and the break that I thought would come never really did. Instead of spending more time in the school after the merger, I mainly went to meetings. So, and that could have been just because it was so new...I mean I don't know...I...anyway, I do still believe in it...the merger. I believe it can work. Even though it was kind of a rocky start, as I'll talk about later.

Anyway, going back to the initial process once I was on board with the idea, then Catherine and I went back to our boards. Although, I also found out later that there was a small core piece of the CMF board who were involved in this from the get-go.

Cody Goetz [00:33:35] Sure.

Stakeholder Eleven [00:33:36] Who basically had been talking with Catherine and said "We have figured something out here to retain this Tier II status." So, they...but the rest of the board at CMF didn't know that...so this was...I don't know what they were if they were an executive committee. I don't know. But anyway...each board...So we went back to our boards and each board had to vote to move forward with an exploratory process. And they did. And then in February 2009 there was a Memorandum of Understanding that was drafted. This was to outline the intentions, which were to increase the strength and vitality of both organizations. You know, we were complementary, not competitive. We weren't competing on the same planes. CMF being the 30-year-old organization, it was determined they would retain the legal entity.

RMCMA would be the education division. And so then...I mean...So that's essentially what was in this memorandum of understanding. So then the MOU [Memorandum of Understanding], and a merger task force was formed. And this was made up of equal numbers of key staff and board from each organization and their task was to perform due diligence. And you know determine if this a good idea or not. And that group met for like six months regularly every week. We
addressed all kinds of issues: mission, vision, culture, history, infrastructure, finance, its donor base. You know, all that...everything.

**Cody Goetz [00:37:44]** Did they compile a document?

**Stakeholder Eleven [00:37:47]** The merger task force?

**Cody Goetz [00:37:50]** Does that still exist?

**Stakeholder Eleven [00:37:54]** You know, that's a great question because as I was going back through a couple of documents to get ready for this, all I could find were the MOU and the actual merger agreement. I could not...I swear that this task force did...that we did have another document, but I can't find it now apparently. Maybe the attorney, who was on our board at the time...one of the attorneys...maybe she has it. I don't know because...one of the things I remember from that document that is missing from everything else was sort of a triumvirate of leadership in the merged organization which would be the executive director, artistic director, and the education director. And that they were all...they would all report to the board instead of being underneath the executive director.

**Cody Goetz [00:39:02]** Sure.

**Stakeholder Eleven [00:39:02]** That's not how it ended up. And I don't know what happened. I can't remember.

**Cody Goetz [00:39:09]** Sure.

**Stakeholder Eleven [00:39:11]** But there may have been...that may have been something that existed that now I don't know where it is. But anyway, I also seem to recall that we did some surveys within the community...within the general community and within our own communities. I'm pretty sure we did a student...student-parent survey and we did a donor survey. Of course we had discussions going on at the staff and faculty. There were some people on both sides who
weren't keen on this merger idea. And primary objections from both sides were that each organization would become diluted and that resources would migrate to the other. Some festival people were worried about, you know, guest artists funding migrating over to the school. School people were worried about budget for their programs going over to the festival because the festival is much more expensive to run. There was a question of culture fit with CMF historically being viewed as the more elite or some would even say snooty of the two, the RMCMA more of a grassroots friendly welcoming, you know, that sort of a cartoonish way of saying it, but, that's how some people felt. Another fear from the RMCMA side was that this might turn out to be more of an acquisition rather than a merger and that their organization would essentially be subsumed by CMF. I believe that's sort of what happened, although it's definitely more complex than that. So anyway, we were going to combine the finances, which I guess that that initial budget was 1.9 million and through the subsequent years, the school budget was decreased. That's actually what happened. So around August or September of 2009, the Merger Task Force took a vote and recommended that the merger proceed. Before that vote, we went around the table and each person basically needed to tell what for them would be a deal breaker. For me, it would be losing the name Rocky Mountain Center for Musical Arts. I was promised that would never happen. Of course it has. The next step was for each full board to take a vote. That was September of 2009. And then the formal merger agreement, twenty-nine pages of it, was drawn up focusing on synergy and leveraging the strengths of each organization. Each organization held events for their own patrons to make the announcement of the merger and then a press release went out jointly. Again in the press release it said that both names would remain. Basically...it's Colorado Music Festival and the education division is Rocky Mountain Center for Musical Arts. A new logo and mission was created. We had a big consultant come in and we had a big
powwow strategic planning type thing and education session for the different board members. You know they had almost 40 board members and we had 10. So that was another...so early on we had some stipulations in there for votes that, you know, to try to help the weight of the whole thing.


Stakeholder Eleven [00:43:54] Anyway the merger was official in October 2009.

Cody Goetz [00:44:07] And so, what would you describe the organizational climate during the early years of the post merger?

Stakeholder Eleven [00:44:24] Well I remained with the merged organization till the end of 2011. I was actually on sabbatical during the fall of 2011 and elected to not return at the end of it. My experience during the first two years was that the first year we were mainly preoccupied with integrating all the systems. I mean it was all the business stuff. It was just an enormous amount of work. It was crazy. But that eventually...that went okay, I think. The second year was when we started, I think, running into some major conflicts with core values and philosophy in terms of operations. And as I mentioned earlier, I had relinquished control when I decided not to be a co-E.D. And that proved to be a problem particularly around certain budget issues.

Cody Goetz [00:45:36] Sure.

Stakeholder Eleven [00:45:38] Especially around things like faculty pay increases. Our faculty had not received a pay increase since the fall of 2008. The merger happened in 2009 and we budgeted increases for fall 2010. Those didn't happen till a year later. So that meant our faculty got no increases for three years. That was a big deal to me and it was extremely stressful... Oh my goodness. So...and...I guess the main issue ultimately was sort of the disintegration of the work relationship between myself and the executive director Catherine Underhill. You
know...I'm not...I don't...I don't want to be...I'm not blaming...I'm not a victim. I participated in this. I maybe was more passive aggressive than I would have cared to admit, but I was directly lied to on more than one occasion and so I felt I could no longer continue in an environment where it was lacking in trust. When these issues would crop up, like with the faculty pay increase, where I was told "oh that's out of my hands, it's the finance committee." And then I go to a Finance Committee who happened to be...who was the president of my board, somebody who was on that...he had never heard anything about this faculty pay thing. So you know I went to these board committee chairs...I was trying to work through....I thought the setup...protocols and going to the chairs of the committees...the Personnel Committee and the Finance Committee to raise issues and later found out that this stuff was never aired in front of the entire board. So, none of these issues were...nobody knew about them...I guess...I was frustrated that we could never have direct conversations about problems and conflicts. The RMCMA pre-merger, we had plenty of problems, of course. But we dealt with them and we talked about it and worked through them. And so...I felt like that just was not something that was tolerated...that everything was fine... Everything was fine all the time. So now again, that's my perspective, but that was my experience. In November of 2011, Kathy and I sent a five-page letter to the board. I was leaving and she decided to leave also...she decided not to stay on as the contract grant writer. So we both left at the same time and we wrote a letter to the board mainly detailing elements of the "cultural chasm" as we would describe it. Issues with things like name, the merger purpose...Kathy served on the SCFD board at that time and she was going to SCFD meetings and hearing comments from her colleagues about this merger being disingenuous and things like that...it was a big PR issue early on, I think. There were issues with budget and staff capacity. We didn't get any formal response to the letter from the board president. Two board members were asked to meet
with us, and they met with us separately. They would not meet with us together. And we kind of hashed out what we had put in the letter, but they never reported back to the full board, we discovered. So again, I don't know, to me it's a cultural issue when you can't have open and direct communication and I think it's problematic. What followed was a period of several months of what I would just call general angst, internal issues, side groups of the board. This board was so big...some of the people have been there since the 70s, but they were forming side groups, then and now and then people were coming to me and...oh it was toxic...it was completely toxic. Very unsettled staff situation. For a period of time, there was nobody in the education position. Lots of behind the scenes gossip and just yuck...Pretty awful. A soured situation. Very stressful. People of course were communicating with me all the time and I was hearing that this name thing was going to happen, the name change was going to happen. It is true that the merger agreement legally said that this all of this remains in effect for a year. So that...I understand that it was covered legally, but it was not how it was sold to us, not how I sold it to my board. And so in January of 2013 I sent another memo, kind of a plea, from a founder about the name because at that point, although this CMF and CMA name had been talked about...at that time the board seemed to be moving more toward Colorado Music Festival and School similar to Aspen.

**Cody Goetz [00:52:29]** Sure.

**Stakeholder Eleven [00:52:31]** Totally different kind of setup. I was all for a name change if it arose organically and reflected something new for the whole new organization. Great. But if you're going to make a change that only changes one side of it and keeps the historic piece of the other organization, to me that was a problem. Ultimately, they did do the CMA thing. Drop the R and M, and it's better than school for sure. Following the 2013 flood, were you around when we had our big flood?
Cody Goetz [00:53:30] No, I was not. I've heard about it, but I was not here.

Stakeholder Eleven [00:53:34] Well, Kathy and I had gone through a period of just... It was just bad and then we...all we wanted...we were hoping for someone...maybe from the board side to just acknowledge the messiness and that all of this stuff that had happened, and to just say just maybe "wow we're sorry," you know, "can we try to heal this?" Whatever...that didn't look like it was happening. So, we thought well we've...then we need to initiate a message of reconciliation if we want some closure, if we want to heal this relationship. So we craft it and especially after the flood it was horrific and all these...we were hearing about people losing things. It was just...we thought this is a time when you see what things matter. And let's just send something...write something to the board saying well this has been a tough thing. We know it's been tough for us. We're sure it's been tough for you, too, can we agree to reconcile and just, you know, try to...kind of calm the waters a little bit, and we were told by the board president that now's not good for that. The timing is not good for that. And I thought wow...this is just us wanting to give...say something to you and this isn't a good time for it. So that message from us never went to the board. That message never happened. And then I would say...the next couple of years was pretty interesting. There were a couple of other executive directors before Liz. Then they hired Liz, which I think was really good and one of the first things she wanted to do was meet with the co-founders of the RMCMA. We met with her in July of 2016 and had a four-hour, fabulous meeting with her. The first thing she said to us she just looked at us and said "I'm so sorry for what happened." That's all she said. She didn't have any part of it, you know? It was bringing some humanity to the situation, which was really all we wanted. You know, hey there are people here, you know? So that was amazing. I apparently had been holding a bunch of stuff
in my body because I thought I was ok and had worked through the stress and whatever, but I had a heart attack two days after.

**Cody Goetz** [00:56:38] Oh my gosh.

**Stakeholder Eleven** [00:56:39] I did.

**Cody Goetz** [00:56:42] Wow.

**Stakeholder Eleven** [00:56:42] And I think what it was I had...stuff I was holding on to and I...

**Cody Goetz** [00:56:47] Just let go.

**Stakeholder Eleven** [00:56:49] Yeah, it's been very interesting because the doctors, they couldn't determine when it actually happened, but the timing is too coincidental. It was meet with her, the next day I felt euphoric...like so happy I couldn't even believe it. The next day was a heart attack.

**Cody Goetz** [00:57:10] Wow.

**Stakeholder Eleven** [00:57:12] So I mean who knows for sure, but...everything with the organization since then I've experienced mostly via hearsay. I still have some friends in the organization. I've attended one fundraising event. I occasionally see people who are involved. But otherwise I have no direct involvement anymore. That door has definitely been left open for me and I appreciate that...You know it's been about eight years of resentment and pain and loss that I think has been transmuting into reconciliation.

**Cody Goetz** [00:58:01] Sure.

**Stakeholder Eleven** [00:58:02] And part of that is taking responsibility for my own part of it and how I participated in it. This wasn't something done to me.

**Cody Goetz** [00:58:11] Yeah.
**Stakeholder Eleven [00:58:12]** You know good things were the building improvements...all the studios we had remodeled some of the studios prior to the merger. Those are all done now. That's great. I think the relationships between teacher and student are still strong. I'm really glad Kathy has stepped back in the education part, but there are some things that have happened for sure. The budget is lower than it was pre-merger for the school. Things we had in place that we worked very hard to put in place. Things like a tiered faculty pay system so that somebody with a doctorate and 25 years of experience was getting paid more than someone with a bachelors who just graduated...They're now paying everybody the same. There's no performance appraisal system in place anymore. No student evaluation system. A lot of that just fell away and I think Kathy is working on getting that back. I have a lot of compassion for Liz because I think she's probably still dealing with some very entrenched patterns with the board. You know, I always thought this organization, I'd be a part of it forever and that, you know I'd find my successor and all of that. So you know it's sad, but I think the further I get away from it the better it is for me. I'm really glad for what we created. I think it's one of the best things I ever did. Even before the merger I always said as soon as it's not fun anymore I'm going to quit. And it's pretty much what did. Yeah I don't know. Anything else?

**Cody Goetz [01:00:32]** Not on my end unless you would like to add something more.

**Stakeholder Eleven [01:00:35]** No.

**Cody Goetz [01:00:35]** Okay, well thank you so much for sharing your story. I really do appreciate your time.

**Stakeholder Eleven [01:00:43]** I'm happy to do it and I think it helps in my own healing and to, you know, to see in my own...to reflect back and see how I've changed...how I'm looking at it from those early years after just, you know, leaving right...right after I left...comparing that to
now. So, I guess, you know, it's all part of whatever journey we're on. So we get lessons whether we're looking for him or not.

Cody Goetz [01:01:19] Thank you again so much.

Stakeholder Eleven [01:01:20] You're very welcome.