



2016-2017 CSGP On-site Evaluation Report Form

Name of reviewer: Kenyon Merritt

Name of organization: Jacksonville Symphony Association

Date of on-site visit: August 2, 2016

Names, titles of organizational representatives:

1. Robert Massey, President and CEO
2. Amanda Lipsey, Director of Grants & Sponsorships
3. Matt McAfee, Board of Director's Chair

Questions for applicant (prepared following review of application and based on CSGP evaluation criteria and related scoring statements as detailed in instructions above):

1. What went into the creation of the Sound Investment Program? (I admitted that the graphic provided in the grant application was hard for me to understand and asked for a 101 definition of the program).

CSCP Criteria: Quality of Programs, Exploration of Innovative Ideas and Programming, Community Impact, Need for Organization in the Community, Community Outreach and Service to Diverse Populations, Management Capability of Board and Staff

Shortly after Robert's arrival in Jacksonville he observed all of JSA's education programs as strong however he knew improvement was possible. Using the Socratic Method staff and board underwent an evaluation of all educational programs and discovered inefficiencies. They realized while serving huge populations they were unable to track whether students were making a life-long connection with music.

Pre Sound Investment Program JSA delivered their programs by a shot gun approach. The Sound Investment Program is an arc from A to B to C by implementing accessibility (listening), understanding (learning) and engagement (creating). The desired outcome for the Sound Investment Program is that each student has a good understanding of the Symphony and Classical music when they leave the school system.

Nearly every topic we covered had a tie with the Sound Investment Program. At the end of our hour and half conversation we reviewed the Sound Investment Program graphic. I then understood how the integrated and comprehensive approach to their educational programs ensures each student will build an appreciation for and life-long connection with our Symphony and its music.

2. Are there any plans to expand a Sound Bites type program to other musical series?

CSGP Criterion: Quality of Programs and Exploration of Innovative Ideas and Programming

Sound Bites allows for patron engagement. Robert stated "we have a patron-centric focus." The Masterwork's series lends itself to small groups attending rehearsals and learning more about the orchestra. At this time there are no plans to expand Sound Bites.

3. Tell me a little more about ImagiNATURE

CSGP Criteria: Exploration of Innovative Ideas and Programming and Community Outreach and Service to Culturally Diverse Populations

ImagiNATURE has given JSA a platform to collaborate with unlikely organizations, such as Timuquan Preserve, and extend their reach into our community. NEA's \$10K grant award was matched by the Downtown Investment Authority. ImagiNATURE will launch at a spring 2017 Art Walk with programming and kiosks about our National Park System as it celebrates its 100th Anniversary.

4. Jump Start Strings is adding a fourth school this year. Is the new school part of Community in Schools? And is there a need to improve the overall program?

CSGP Criteria: Community Impact and Need for the Organization in the Community

Robert stated that "Jump Start Strings changes lives" and he challenged his education team to take the program to the next level. He admitted the program has its limitations with CIS schools and their locations, resources, time, and instruments. The new school is outside of CIS.

This year Jump Start Strings will come together with the Youth Symphony Orchestra in an effort to ensure the young musicians will have a place to continue their music once terming out of Jump Start Strings.

5. Please elaborate on skill levels within YSO and tell me how you advertise for auditions.

CSGP Criterion: Community Outreach and Service to Culturally Diverse Populations

YSO has six levels and as skills improve the musicians climb to a higher level. Level 5 (Preparatory) and Level 6 (Philharmonic) feature superb musicians and are extremely competitive. It is not uncommon for young musicians to choose between being positioned on the front row in Level 5 or the back row in Level 6. The musicians, their teachers/families and the Director of the Youth Orchestra, Scott Gregg, must decide what's best for their musical future. FSCJ has been added as a satellite site for YSO.

Auditions are advertised through social media, the JSA website, email, and, through strong relationships with schools and private teachers. The auditions are for placement only, no one is turned away.

6. How do you advertise for open positions for the Orchestra?

CSGP Criterion: Community Outreach and Service to Culturally Diverse Populations

JSA advertises, for eight weeks, through the industry's trade paper which is a national publication. Auditions are conducted as specified by their union's collective bargaining agreement.

7. Is there an average number of applicants per open position?

Robert – No, it depends on the instrument. Perfecting certain instruments provide more professional opportunities than others. Violin and viola players have more options than horn musicians. Therefore we will have many more individuals audition for a horn vacancy than a vacancy in strings."

In further conversation I was reminded that JSA employs 54 fulltime musicians for a 35 week season. Jacksonville is often a launch pad and the average attrition rate is two – four members.

There is an untold story about the musicians. Every one of them works well beyond the estimated 60 hour work week. They go outside the Symphony with their individual outreach to teach all ages as well as perform pro bono and for-hire. Many of them leave the area during the off-season and perform in another part of the country. Of note, the St. Augustine Festival is made up mostly of JSA musicians.

7. From a Board Chair perspective what is the impact of reducing the size of the Board?

CSGP Criterion: Management Capability of Board and Staff

Matt – our board was too big and not overly effective. Our bylaws allow up to 45 members including two musicians and three auxiliary members and, everyone is now engaged.

8. How will each of you define Vision 20/20 as successful?

CSGP Criterion: Management Capability of Board and Staff

Matt – when we hit our goal. We are going in the right direction and are on our way!

Robert – by developing strategies to achieve/answer the following goals/questions

- ✓ Is it reasonable to set “x” millions of dollars for our endowment expansion and what will be able to do with the draw from that endowment?
- ✓ The need to be competitive in our compensation.
- ✓ Are our programs the right fit for this community?
- ✓ How can we make our enhanced technology do more?
- ✓ Filling key staff positions.
- ✓ How do we sustain our growth?
- ✓ How can we become a “model regional orchestra?”

Matt noted that Robert and Courtney have the vision and leadership to succeed in all areas.

Any updates to application provided by organization? Please record.

None at the time of the visit.

Overall - Positives:

Robert (and Courtney) are exceptional visionaries and have proven, in a short period of time, they have the leadership skills to be successful. Staff, board and musicians are engaged and in harmony with one another as evidenced in their annual gathering at the beginning of each season to break bread and enjoy fellowship around a common denominator be that passion, profession or community service.

Overall - Challenges:

It’s my opinion that neither the President/CEO nor Board Chair let challenges stand in their way. Their quest to improve “all things Symphony” coupled with their can-do attitude is infectious throughout the in the organization and serves as an incentive for high achievement. JSA has a lot of spinning plates that require constant attention.

Any Additional Comments:

I asked Robert to take me on stage in Jacoby Hall and point out why our symphony hall is one of the best in the world. Fascinating behind the scenes tour! When the performance hall was built 20 years ago the riser originally covered the back half of the stage in a semi-circle. This presented an impossibility of moving a piano from off- stage to on- stage. A section of the riser was cut and removed on both sides. While the audience can hear the exact same sound(s) from any location in the hall (as acoustically designed) the musicians are unable to hear the instruments of their colleagues. The problem was researched and JSA has been told to bring the two removed riser sections back on the stage as that was the original design. The two cavities on either side swallow the sounds coming from the stage. Once the risers cover the back half in a semi-circle the instrument sounds will rise up and float back down evenly over the orchestra.



2016-2017 CSGP On-site Evaluation Report Form

Name of reviewer: Ann Carey

Name of organization: Mandarin Museum and Historical Society

Date of on-site visit: August 12, 2016

Names, titles of organizational representatives:

1. Sandra Arpen, President
2. Karen Droege, Board Secretary

Questions for applicant (prepared following review of application and based on CSGP evaluation criteria and related scoring statements as detailed in instructions above):

CSCP Criteria: Quality of Programs; Exploration of Innovative Ideas and Programming

1. Tell me more about how you come up with your ideas for programming and how development of the five year strategic plan has impacted the process?
 - The ideas come from the needs as defined by the community and the organization's Mission Statement: The property went up for sale that hosted the last remaining one-room schoolhouse in Duval County – was the Mandarin Museum interested in buying and preserving it? The Losco family ran a wine making business - did the Museum want to preserve the building and all its artifacts? David Losco had an old box of letters and telegrams sent from his uncle in France during WWI that his kids didn't want and that he didn't want thrown away when he died – did the Mandarin Museum have an interest in preserving them? Each of these scenarios has played out for the Mandarin Museum. Who else would have preserved these important artifacts from Mandarin's history and developed them into exhibits and presentations that will tell the story for future generations? The board members are creative and passionate and have a "can do" attitude that helps them capture Mandarin's history in an inspiring and educational way. There is plenty of interesting history to be captured and preserved and the board develops these in a way that is interesting and engaging to the public.
 - The five year strategic planning process helped the board to understand more clearly what they wanted to be as now reflected by their mission and vision statements. And they know they don't want to try to be everything to everyone. Board development has greatly helped the museum as the board has expanded and now includes more men, younger members, a person of Hispanic heritage and an African American lawyer/minister who has helped significantly in opening doors for both the African American community and the museum in development of trust and new relationships that will help the museum tell the story of Mandarin inclusive of its rich black history – which hasn't been told before.

CSPG Criteria: Community Impact; Need for the Organization in the Community

1. Aside from the outreach program to the schools, how are you connecting Mandarin to other parts of the city?
 - The designation as a CSG awardee provides a legitimacy for the museum, as well as visibility and marketing to the greater Jacksonville community. In addition, relationships with Cultural Fusion and meetings quarterly with the Jacksonville History Consortium provide visibility and opportunities for collaboration. Information and events about the museum are posted electronically on their website and

other event calendars. And visitors interested in civil war history from outside of Jacksonville – and even outside of the country – find the museum through interest in the *Maple Leaf*, the only National Historic Landmark in Duval County and fourth shipwreck site in the country with this designation. In the African American schoolhouse, an exhibit represents education of the African American community in south Duval County, so the history of Mandarin is woven into the broader history of the community.

CSPG Criteria: Community Outreach and Service to Culturally Diverse Populations

2. The majority of Mandarin's residents a hundred years ago were black; now with the addition of the school house, are there any plans to further delve into the lives of that population? And how about diversity of your board and your volunteers (age, race, ethnicity, sex)?
 - It was recognized in the past few years that the board was not diverse enough: it was primarily made up of retired, white women. Through board development with the Nonprofit Center, many changes have since been adopted: the board now has men, younger members, and at this time one black member who happens to be a part time pastor at the Philip R. Cousin AME Church in Mandarin.
 - This board member has been instrumental in fostering relationships with a portion of the community that was otherwise unrepresented in Mandarin's history. Relationships are being built and trust is being created: the AME Church was represented at the grand opening of the schoolhouse. The schoolhouse was opened by the ringing of the bell by the 85-year old son of two of its students; the names of the black families and their children who were known to attend the school are on the walls for all to see. The black families who came to the grand opening, which made up about half of the visitors that day, spent hours inside the schoolhouse. This schoolhouse tells a story that no one else was telling and it tells the story with integrity – and that has helped to build trust between communities where it had not existed before.
 - All of the school records were lost in a fire at St. Joseph's in the 1960's so there are very few artifacts outside of the schoolhouse, but the opening of the school house has interestingly given new life to the museum's oral history program.

CSGP Criterion: Management Capability of Board and Staff

1. You've been operating without an Executive Director for a few years; can you tell me more about the decision to eliminate the position and now to recreate it (how do you operate with no paid staff)?
 - The board did employ, up until 2012, an Executive Director. Due to funding issues – they ran out of money – the position was eliminated and the director's responsibilities distributed between committees and members of the board. The board, however, has matured since then – it took this crisis to pull them together - and is in a different place today. They know now what they have to do as a board in terms of board development, strategic planning, and fund raising, and have created a Directors Fund to raise two-years of salary before hiring another Executive Director – a day they are looking forward to!

What keeps you up at night?

- Sandy: How long can we (the board) keep this going? We need professional leadership.
- Karen: Application of the CSG takes a lot of volunteer time in writing the application and meetings. With a small budget, the CSG grant opportunity is equally small and the board discusses each year if the effort is worth the reward. And this year the answer is yes – and having to report to the council quarterly helps the board to stay on its game and operating at the highest level. It is worth it, but it is hard to do without professional staff.

Any updates to application provided by organization? Please record.

- Documentation for Community Outreach, Service to Culturally Diverse Populations, Community Impact, and Need for the Organization in the Community: Sister of St. Josephs of St. Augustine newsletter article entitled "A Day in Paradise" with comments by Sister Thomas Joseph on the grand opening of the St. Joseph's Mission Schoolhouse for African-American Children in April, 2016 (the article is near the bottom of the newsletter).

Overall - Positives: Although it's still a working board that runs the museum, the board has become much more strategic as well as diverse in just the past two years, and those changes have resulted in greater benefit and impact to the community by inclusivity - exactly what we expect from a CSG grantee. I am so excited about the opportunities that

the schoolhouse presents the community in documenting Mandarin's African American history! And you wouldn't know by the quality of the exhibits that it's a volunteer organization; board members and volunteers (and there are many) are passionate, engaged, and committed.

Overall - Challenges: Operations takes a lot of time from the volunteer board; the board recognizes the need to fund and hire a professional to run the museum and also recognize their need to learn how to better fundraise.

Any Additional Comments: What the board and volunteers have achieved with eleven acres, six historic structures, new relationships in the community, and a healthy dose of commitment, creativity, and passion to capture, preserve, and tell the history of Mandarin is simply outstanding. They have achieved more than just recognition as a museum and historical society: they've created a place of community in the middle of Mandarin that celebrates history, music, the arts, and nature. The schoolhouse project is a really big deal as it has opened doors for finding and preserving the African American history of Mandarin.