



La Porte County Symphony Orchestra

Executive Director Report – Lee Bauman

January 2009

Meetings

- 12-1 First day in office (training and began work on January Concert)
- 12-4 Lubeznik Center meeting
- 12-8 Walk through with Civic and Hospital Foundation for Holiday concert
- 12-9 Fund Development Meeting
- 12-10 Bookkeeper meeting
Michigan City Enrichment Corporation – Dinner and presentation
End of January projected arrival of grant \$10,000.00
- 12-10 Staff Meetings
- 12-16 Horizon Bank meetings
- 12-17 Staff Meetings: Librarians & Bookkeeper
Leadership La Porte County Open House
- 12-18 IUNW luncheon- Non-Profit Institute network
Friends of Symphony Meeting w/ president
La Porte County Visitor's Bureau at Blue Chip- toured new addition
- 12-23 Interview potential interim Operations Manager
- 12-29 Tour of possible new office space
- 1-5 Friends of Symphony Meeting w/ president
- 1-6 Hoosier Star Planning
- 1-7 Bookkeeper meeting
Artistic Committee Meeting
- 1-9 Move to new office space
- 1-12 Fund Development Meeting
Hoosier Star Meeting preparation
La Porte Hospital Foundation meeting
- 1-13 Friends of the Symphony Luncheon (cancelled)
Orchestra Rehearsal – asked for volunteered services at Hoosier Star 2 comp balcony tickets for each participating musician
- 1-14 Bookkeeper meeting
- 1-15 Breakfast Showcase with Sheryl Edwards to promote Hoosier Star and Jan concert
- 1-21 Volunteers to assemble the American Songbook
- 1-23 Set up for Concert

Events

12/2	Rehearsal	LPHS	7-9:45
12/8	Rehearsal	LPHS	7-9:45
12/9	Rehearsal	LPHS	7-9:45
12/12	Rehearsal	Civic	7-9:45
12-13	Holiday Concert		
1/13	Rehearsal	LPHS	7-9:45
1/20	Rehearsal	LPHS	7-9:45

1/24 Dress rehearsal Elston 11:00 AM
1/25 Concert

Correspondence

Mailings

Weekly letters for to thank for funding on letterhead for tax purposes
Mailing to all past Friends of the Symphony to increase membership organized by Mary Ellen McCain
Mailing to all previous persons who auditioned for Hoosier Star organized by Sheryl Edwards
Created correspondence with all local hotels and B&B to address housing of guest artists and conductor on concert weekends to secure comp rooms.

Marketing

E-blasts

12-19 Season Greetings/Gift of Music – tickets & donation
12-29 Press release on new executive director
1-5 Friends of Symphony meeting
1-5 Press release on January Concert
1-6 Informed musicians that music was ready to pick up and requesting their participation with preconcert activity and musical instruments.
1-22 Re-release on January Concert to general email list and press

Currently developing a news letter format of an e-blast that will include our office move, photos of January concert, March fund raising & concert activities, April preview and Hoosier Star information

Newspaper Ads

1-5 January Concert

Press Releases

12-29 Announcing new executive director
1-5 January Concert
1-20 Special Press release for Michigan City Dispatch

Publications

1-5 American Song Book for January Concert
1-14 Program revision for January Concert

Signage

Poster & flyer for January Concert created -Distributed by LPC Visitor's Bureau list, Lubeznik's Mc Donalds, emailed to preschools, churches, & senior centers. Also taken by musicians & Hoosier Star committee to distribute.

Concert Sponsor Thank you Poster

Television

12-9 Cheryl Ferguson interviewed on Eye on the Arts for the January Concert

Website

Posted new executive director announcement
Updated Friends of Symphony page for January's meeting
January concert info updated and Poster posted
Musician sign up for Hoosier Star
Hoosier Star Audition Forms posted to download

Other Activities:

Changed job title for Kellene Urbaniak to Communication Coordinator.
There is no change in the rate of pay. It is recognition for her work with
press releases, eblasts, posters, program book layout work and more.

Created plan for preconcert and concert for January Community Festival:
Lubeznik Center Tile Project
Grant Fitch story telling
Musician's instrument touch
Hoosier Star Karaoke
Trinity Community Children's Choir - Sunny Garner Orbovich's chorus
Soul Steppers
Boy Scouts of America

Contracted with Grant Fitch and Michigan City Soul Steppers for January
concert participation.

Revised procedures for methods for deposits and communication with
bookkeeper

Created a marketing plan for January concert by determining how to reach
a target audience of preschool through 4th grade children and families.
Listing was created of preschools, private schools, & churches. Emails
were added to Constant Contact of child related organizations.

Correspondence with IUNW regarding funding for the 2009 year including
program ad, table sponsorships, as well as, concert sponsorships.

Working with Barker Welfare Grant application standards and developing
programming suitable for their guidelines

Began Indiana Arts Commission Grant application process

Organization of new office space

Concept: A CULTURAL "NIGHT OUT" IN LA PORTE

The newly renovated La Porte Hotel and Conference Center is interested in working with the Lubeznik Center for the Arts and the La Porte County Symphony Orchestra to create a major cultural event that would attract people from throughout the area for a reception and dinner in the conference facilities or the atrium of the hotel. Possibilities include a "mini-exhibition" by the Lubeznik Center, music by representatives of the orchestra and much mingling and focus on the importance of the arts to our region. In the process, we would help introduce the reincarnated (and much improved) hotel to the region.

Lynn Boatwright, Director of Sales, will be the contact person at the hotel. Her telephone number is 219-362-4585 and her e-mail address is lboatwright@theworthingtongroup.com. Her FAX # is 219-324-6993.

Leigh Morris

219-362-4998

lmorris@csinet.net

January 20, 2009

Made in the USA

A Brave New World Classic Concert

Saturday, March 7, 2009; 7:30 pm

March concert fund raising effort 2009 – A Premiere Wine, Appetizer, & Raffle Party

Who: Market it to general public, by postcard & eblasts & part of ad for concert

What: A Pre Concert Wine & Appetizer Party to meet our celebrities and raise money for the orchestra

When: 5:30 or 6:00 – 7:00 pm Concert begins at 7:30

Where: Facility – additional time at the civic / pricing to be negotiated

How: All items donated with a lot of volunteer assistance

Buy tickets to use in any way you want.

1 ticket for each wine taste, filling a glass with just a small taste – maybe beer too?

several tickets to purchase a single glass of wine or large trays of food

tickets will be used for appetizers, soft drinks, chances for prizes

Any one that comes can participate

Live auction if there is large donation

Concerns: Time, invitations must go out now!

Check on liquor laws and gaming restrictions

Tables, Linens, wine service, food,

Entertainment Saxophone Concerto musician/composer

Pre concert talk from the Maestro

April Pop's theater performers can be servers of food in Broadway costumes

Hoosier Star celebrities may perform or be available

Projected Budget

Design & Mailing Postcards, bulk rate for local/Not bulk rate for out of town - \$700.00

Advertising will be part of the Concert budget

Facility costs: \$800.00-1000.00 for extra time opening building for setup, staff, security guard & linens

Wine – donated

Need licensed servers – may have a group that will work for tips

Food- donated

Linens we have enough denim toppers,

Napkins, Glasses, Dishes – donated or 150.00

Wait staff & clean up - volunteers

LCSO 2008-09 COMMITTEES

ARTISTIC COMMITTEE

Decides season concerts programming, submits budget for next year and develops musician personnel standards. Meet 3-4 times a year.

Phil Bauman, Chair
Lee Bauman
JoFran Bendix
Dana Chartier
Sheryl Edwards
Marcia Morris
Meg Rodgers
Chuck Steck
Kellene Urbaniak

BOARD DEVELOPMENT

Nominate officers and new board members. Meet 2 times a year.

Marcia Morris, Chair
Lee Bauman

CHILDREN'S CONCERT

Administrate and organize events leading up to, during and after each concert Meets for 1 meeting.

Mike Drayton, Chair
Philip Bauman
Lee Bauman
Marcia Morris

CONCERT

Administrate and organize events leading up to, during and after each concert. Meet at least 6 times a year.

Lée Bauman, Chair

John Cannon
Rose Charo
Joyce Cook
Helen Cutler
Barbara Dancisak
Sheryl Edwards
Richard Emmons
Terry Hundt
Frances Jones
Cee Cee Kaylor
Ann Toepel Klipstine
Jane Langford
Donna Larson
Marcia Morris
Mary McColl
Florence Pieplow
Jay Pouzar
Peg Swanson
Andrea Taylor
Barbara Troy
Kellene Urbaniak
Georgia Whitted

EVENTS

Develop, organize and oversee 2 - 3 fund raising events each season. Meet at least 6 times a year.

1. _____, Chair
fund raising/Gala in fall/other things possible

Doug Busby
Rose Charo

2. HOOSIER STAR 2009 -June fund raising - has extensive sub committees

Sheryl Edwards, Chair
Philip Bauman
Lee Bauman
Yvonne Lindborg
Marcia Morris

advertising (including print, radio, courthouse sign, billboards) chamber & community meetings, news and feature articles, April Pops group fundraising, annual ticket sales. Meets 4 times a year.

Lee Bauman, Chair
John Cannon
Marcia Morris
Ted Taylor
Kellene Urbaniak

FRIENDS OF THE SYMPHONY

Formed in Feb. 2005, this group brings enthusiastic support to all aspects of the LCSO. Bi-monthly luncheon meetings are held. Board members are always welcome and encouraged to attend.

Mary Ellen McCain, President
Pam Dishman, Vice President
Elizabeth Dekker, Secretary
Lee Bauman
Marcia Morris

YOUNG ARTIST COMPETITION

Orchestrate all aspects of this contest from beginning to end. Meet two times.

Marcia Morris, Chair

*** President of the Board & Executive Director are members of all committees**

FUND DEVELOPMENT

Raise funds, oversee database and find major donors to support the orchestra throughout the season. Meets 12 times a year.

Leigh Morris, Chair
Lee Bauman
JoFran Bendix
Doug Busby
Mike Drayton
Joe Goepfrich
Yvonne Lindborg
Marcia Morris
Stephanie Oberlie
Ted Taylor

MEMBERSHIP, MARKETING

& PUBLIC RELATIONS

Develop and implement program book,

A POSSIBILITY:

A donor has indicated the possibility of making up to a \$25,000 contribution to the endowment fund of this or some other favored not-for-profit organization. If selected and approved, the donor would stipulate that it would be subject to two conditions:

1. It must be matched by a similar contribution from members of the organization's Board of Directors and/or a select group of donors who would contribute at least \$2,500 each; and
2. The combined total of the donor's \$25,000 and the \$25,000 contribution from members of the Board of Directors and select donors would be matched by \$50,000 in donations from others.

If the above steps are successful, it would result in an increase of \$100,000 in the organization's endowment fund. If less than \$25,000 is raised in step one, the donor's contribution would be reduced accordingly. Likewise, if the matching contributions referred to in step two are less than \$50,000, the contribution of the donor and the contributors in step one could be reduced proportionately.

Challenge Donor	Board and/or Major Donors	Other Contributors	Total Addition to Endowment
\$25,000	\$25,000	\$50,000	\$100,000
\$20,000	\$20,000	\$40,000	\$ 80,000

Is the organization interested in this concept? If so, is the time right for it to happen now?

PROPOSED 2009-2010 FUND DEVELOPMENT CALENDAR

Month	Targeted Objective
February	Fund Development Committee Meeting, 4:30pm, February 24, at Symphony Center
March	Next Year's Concert Season Finalized Concert Sponsorship Plan Approved by the Board of Directors Overall Fund Development Plan Developed Budget Approved by Board of Directors
April	Concert Sponsor Prospect List Developed and Solicitation Letter Developed Fund Development Mission Statement Developed or Reconfirmed Pre-Season Ticket Sales Effort Begins at April Concert Begin Program Book Advertisement Solicitation Requests sent to Potential Concert Sponsors
May	Personal Solicitation Follow Up Scheduled General Solicitation of Donors
June	Membership/Season Ticket Solicitation Mailed Begin Program Book Advertisement Solicitation
July	Concert Sponsorships Commitments Complete
August	Complete Program Book Advertisement Solicitation
September	Fund Development Solicitation Letters Mailed Gala Concert Fund Raiser
October	Plans for Increasing Endowment Giving Formulated
November	Year End Giving Appeal
December	Plans for Next Year's Fund Development Effort Formulated



LA PORTE COUNTY SYMPHONY ORCHESTRA

Case Statement for Funds Development Program

Why is the La Porte County Symphony Orchestra worthy of philanthropic support?

Section	Description
<p>Mission Why does the Orchestra exist?</p>	<p>The Mission of the La Porte County Symphony Orchestra is to bring the joy of music to La Porte County and surrounding areas and to broaden the artistic experience of the people it serves. The orchestra is committed to education and seeks to cultivate young artists and audiences. It will be faithful to its role as a community asset and will seek ways to strengthen the region.</p>
<p>Vision How do we want the Orchestra to be seen and thought of by its members and other constituents? The Vision Statement should facilitate completion of the phrase "The La Porte County Symphony Orchestra is an organization that . . ."</p>	<p>The La Porte County Symphony Orchestra is a vibrant cultural resource for the region it serves which is primarily La Porte and Porter Counties in Indiana and Bertien County in Michigan. It provides a unique opportunity for musicians in the area to improve their musical talents by reaching for and attaining levels of professionalism not normally seen in an orchestra of this size. There is a major emphasis on educating young people and offering enriching opportunities for growth. The orchestra offers with such programs as the annual Children's Concert that reaches thousands of area elementary school students, the Young Artists program that spotlights the unique talents of young performers, and the "Student Apprentice" program that provides opportunities for high school musicians to perform alongside (side by side) orchestra members. The "Hoosier Star" contest and concert provides outstanding soloists with the opportunity to perform with the orchestra in a venue that rivals the best national contests. The orchestra strives for a balance between the finest in classical and contemporary music, always with the highest standards of professionalism.</p>
<p>Values What are the guides for decision-making affecting the future of the Orchestra?</p>	<p>The key values which guide decision-making for the La Porte County Symphony Orchestra are</p> <ol style="list-style-type: none"> 1. Professionalism—consistent high standards 2. Excellence—dedication to the highest practical performance standards 3. Balance—striving consistently for balance between high quality contemporary classical and traditional music 4. Integration—collaborating with other organizations and resources to strengthen the cultural fabric of the region 5. Community Orientation—seeking opportunities for reinforcing the connection between the orchestra and the communities it serves



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Section

The History of the Orchestra

Why and how did the La Porte County Symphony Orchestra come into existence? What issues caused its formation?

Description

The LCSO was conceived in the winter of 1971 by a young LaPorte music teacher, John Bennett, and came into being the following year, its nucleus being a sixteen-member chamber group already in existence. Its first performance featured the music of Rossini, Handel, Gershwin, and Schubert's "Unfinished Symphony." Named the LaPorte Symphony because of its origin, it has since been renamed the LaPorte County Symphony Orchestra, but it is more than that. A large portion of its musicians come from La Porte and Porter Counties, with the remainder traveling from as far away as Hammond on the Illinois state line, South Bend to the east, and southern Michigan. Many of the LaPorte Symphony's people are home-grown or, at least, resident transplants. They could be anybody's neighbors: doctors, dentists, lawyers, homebuilders, teachers, housewives, retirees and students. The members of the governing board are people who recognize the LCSO as a cultural gem and community asset.

Since its founding by John Bennett, the orchestra has had only seven music directors over the years. Several of its conductors have been members of neighboring orchestras; the present one, Philip Bauman, has had experience with the Battle Creek Symphony, Chicago Opera Theater, the Elgin Symphony Orchestra and the Northwest Indiana Symphony among others.

Over the years the LaPorte Symphony has played five world premiere pieces of music: one composed by guest conductor Zeal Fisher, commemorating its 20th season, a suite from the musical score of the motion picture "Prancer," filmed in the La Porte area, home of its director, and most recently, an arrangement by LaPorte native Alan Barocus of Gershwin's "Summertime," featuring three vocalists, the symphony orchestra and Tom Milo's Big Band.

Many of the orchestra's concerts are held in the 3,000 seat Civic Auditorium, including an annual Boston Pops-type concert, complete with candlelight, decorated tables, and refreshments. There is also a remarkable day of Children's Concerts requiring the strategy and the planning on a par with a D-day invasion. A veritable armada of school buses surrounds the auditorium for each concert and unloads 7,000 youngsters for three performances in one day. To whet the appetite of school children, many orchestra members participate in docent programs, taking their instruments and talents into area schools to demonstrate what pleasures lie ahead.

The LaPorte Symphony has never shied away from artistic challenges; rather, it has explored the entire gamut of musical literature.



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Section

Description

The Orchestra's Unique Role
Why is the Orchestra worthy of philanthropic support?

The orchestra is a major cultural resource and standards setter for the communities it serves. There is strong evidence that the quality of the cultural resources of a community strongly influences the economy and quality of life its residents can experience.

The Challenge and the Opportunity
What is the need?

The key reason for initiating a funds development program for the La Porte County Symphony Orchestra is to help assure that the mission of the orchestra can continue to be fulfilled. The Board of Directors wants to assure that the quality and range of performances for which the orchestra has become known are not compromised, and that the orchestra will be as pertinent to future generations as it was to its founders in 1974. That requires new initiatives to help people know about, understand and celebrate the contribution the orchestra makes to the quality of life for area residents.

The Proposed Solution
How will we meet the need?

The orchestra's funds development program has two components:

1. **A Current Giving program** will facilitate ongoing annual concert sponsorships and contributions as well as memorial and special occasion gifts. A portion of these gifts (unless otherwise designated) will be utilized for current financial needs of the orchestra and the remainder will be transferred to the Endowment Fund. The actual percentage to be transferred to the Endowment Fund will be determined from time to time by the Board of Directors.

A Planned Giving program will encourage persons interested in assuring the long-term continuity of the orchestra and enhancing its ongoing contribution to the cultural life of the region to make bequests or deferred gifts of various types to the Endowment Fund.



Case Statement for Funds Development Program

Why is the La Porte County Symphony Orchestra worthy of philanthropic support?

Section	Description
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The Goals

What do we hope to accomplish?

1. Expand the Endowment Fund

It has been clear for some time that normal funding sources (primarily memberships and concert sponsorships) are inadequate to assure the long-term survival of the orchestra. The Board of Directors created the La Porte County Symphony Orchestra Endowment Fund administered by the Unity Foundation of La Porte County. Contributions and bequests received for this fund will be permanently invested and only the income from these investments will be utilized for the Orchestra's current needs.

2. Upgrade Educational Programming

Working in conjunction with the Unity Foundation and other cultural groups, the Orchestra intends to develop expanded educational programming which will be tailored to enhancing awareness of the role of the arts and culture in community life and broadening the cross-section of people who participate in concerts and other cultural activities.

Leadership and Management

How will the funds raised and managed?

The orchestra's Board of Directors will set overall policies and direction for the funds development efforts. The President has appointed a Funds Development Committee that will be accountable to the Board in carrying out the function. Policies and procedures approved by the Board of Directors and overseen by the Executive Committee of the Board will govern the Endowment Fund. A list of members of the Board of Directors, the Executive Committee and the Funds Development Committee is attached.



Case Statement for Funds Development Program

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<p>Avenues for Giving What options are available for those who would like to support the Orchestra?</p>	<p>Gifts of any amount will be appreciated and all donors will be recognized in the next edition of the Orchestra's Program Booklet (unless anonymity is requested). In addition, the following avenues for giving have been established by the Board of Directors:</p> <ol style="list-style-type: none"> 1. The Symphony Circle—Persons who provide confirmation that they have included the La Porte County Symphony Orchestra in their estate plans or who have made provision for the Orchestra through a life income gift (e.g., charitable remainder trust, charitable gift annuity, remainder interest in personal real estate, life insurance, etc.) qualify for membership. 2. The Symphony Tribute Fund—Gifts of any amount in honor or memory of someone. Acknowledgements are provided to the donor as well as the person being honored or memorialized (or the appropriate family member thereof) when contributions are made. 3. Orchestra Support Fund—Unrestricted or endowment fund contributions. Gifts can be made by cash or check or by transfer of shares of stock, other securities or other assets. 4. Endowment Fund—Contributions that are to be permanently dedicated to providing ongoing long-term investment income for the orchestra. These are gifts that can keep on giving for generations to come.

LAPORTECOUNTYSYMPHONYORCHESTRACASESTATEMENT001408.DOC LEM:LEM



LA PORTE COUNTY SYMPHONY ORCHESTRA

Donation Options

CONTRIBUTIONS AND BEQUESTS

Many members and friends of the Orchestra have expressed interest in providing additional financial support so that the Orchestra can continue to fulfill its mission for generations to come. The Orchestra is a tax exempt organization under the provisions of the Internal Revenue Code Section 501 (c) (3), so contributions are tax deductible.

EMPLOYER MATCHING CONTRIBUTIONS

A number of employers provide matching grants to multiply the benefit of their employees' contributions to qualifying organizations. Some also match contributions by retirees and spouses of employees as well.

Check with the personnel office of your employer to see if they have such a program in place. If they do, obtain a matching gift form, complete it and send it with your contribution to **The La Porte County Symphony Orchestra, P.O. Box 563, La Porte IN, 46352**. We will do the rest. Matching gifts by these participating companies often double or even triple the impact of an individual's contribution.

WAYS OF CONTRIBUTING

1. Contributions of cash

Giving cash is the most popular way of gifting due to its simplicity. Cash gifts may be made by currency, check, money order, or bank draft

2. Gifts of Marketable Securities

Gifts of marketable securities, or stock listed on an exchange, can be an advantageous way to make a substantial contribution to support the Orchestra. There is no taxation on the gain of appreciated stock given directly to the Orchestra. The fair market value on the date of the stock gift is deductible for income tax purposes.

Gifts of closely held stock, or securities not traded on an exchange, may also be accepted. However, such gifts should be discussed with a representative of the Orchestra prior to the time the gift is made.

3. Gifts of Real Estate

Gifts of real estate offer great flexibility in financial planning. All proposed gifts of real estate are reviewed by the Orchestra and its Board of Directors before the gift is accepted.

An outright gift of appreciated land or other real estate has several immediate benefits for the donor: there is no taxation on the appreciation of the real property; an income tax deduction is available for 100 percent of the fair market value of the property as of the gift date; and your taxable estate is reduced by the value of the gift.

5. Bequests

A bequest through a will or trust is the most common form of planned gift. A bequest allows you to make a substantial contribution to support the Orchestra without diminishing the assets available to you during your lifetime. Because a bequest to the Orchestra is tax deductible for federal estate tax purposes, important estate tax savings can result, and your federal estate tax burden may be reduced or eliminated.

6. Life Insurance

Gifts of life insurance can offer an attractive way to benefit the Orchestra at a relatively low cost; gifts of new or existing policies may also provide tax benefits. A gift of life insurance may be especially attractive for younger persons due to the lower premium expense. For others, the reason for having a policy in place may no longer apply. For example, the children may be grown, there may be no mortgage remaining on the family home, or a spouse may have other assets for support. In these situations, donating an existing policy may be a wonderful way to support the Orchestra.

La Porte County Symphony Orchestra Endowment Fund Policies

<p>I. GENERAL INFORMATION</p>	<p>The Board of Directors of the La Porte County Symphony Orchestra (LCSO) uses an Endowment Fund to help assure the long-term viability of the orchestra. Income from the Endowment Fund supplements membership subscriptions and current donations to assist in stabilizing sources of income for LCSO operations. LCSO has traditionally been conservative in all aspects of its management and expects the Endowment Fund to follow that pattern.</p>
<p>Why has the Endowment Fund been created and what guides its management?</p>	<p>Tax Identification Number: 23-7378110 Custodian: Unity Foundation of La Porte County Investment Oversight: Unity Foundation of La Porte County with annual reports provided to the LCSO Board of Directors</p>
<p>II. Key Information</p> <p>Identification of key responsibilities</p>	<p>III. Objectives</p> <p>The investment objectives for the Endowment Fund are established by the Board of Directors of the Unity Foundation of La Porte County:</p>
<p>What are the benchmarks for decision-making affecting the Endowment Fund?</p>	<p>IV. Asset Allocation Guidelines</p> <p>Investment allocations are determined by the Board of Directors of the Unity Foundation of La Porte County:</p>
<p>What categories of investment vehicles will be used and in what proportion?</p>	<p>V. Distribution of Dividend and Investment Income</p> <p>Continued growth of the Endowment Fund and meeting the current financial needs of LCSO will be fostered.</p> <ol style="list-style-type: none"> 1. An amount equal to 5% of annual unrestricted or undesignated gifts to LCSO will be transferred to the Endowment Fund at the Unity Foundation of La Porte County on or near July 31, which corresponds to the end of each LCSO fiscal year unless otherwise decided by the LCSO Board of Directors. 2. 100% of distributable earnings from the Endowment Fund shall be transferred annually to the LCSO general operating account unless a lesser proportion is requested by the Orchestra's Board of Directors. The distribution shall be made as available from the Unity Foundation of La Porte County. 3. As part of its annual fundraising initiatives, strong efforts will be made by the Board of Directors of LCSO to request direct contributions from donors to the Endowment Fund at the Unity Foundation of La Porte County. The Board of Directors shall receive an annual report on the status of these efforts. 4. On an annual basis, the LCSO Board of Directors shall formally review and affirm this endowment policy. Any changes to the policy shall be brought to the Board of Directors for consideration through recommendations from appropriate committees established by the by-laws or the LCSO Board of Directors.
<p>How will the money flow into and out of the Endowment Fund?</p>	<p>VI. Securities Guidelines</p> <p>All investment vehicles chosen for the Endowment Fund are selected by the Board of Directors of the Unity Foundation of La Porte County.</p>
<p>What investment vehicles will be used?</p>	

Revised 3/14/2007

Reason for Leaving:

Moving out of state

In general how would you describe your working relationship with the LCSO Board and the Executive Committee ?

I would describe it as a comfortable relationship.

How would you describe communication ?

A. Throughout the organization

No problems for the most part.

B. Between you and Phil

Good until Phil took the NISO position and then things were a little more last minute but now this has settled down.

C. Between you and Lee

Fine

D. Between you and Kallene

Fine

Considering everything, how would you rate your level of satisfaction with your employment here – on a level of 1 to 10 with 10 being very satisfied.

8

What was your most satisfying part of the position of Executive Director ?

Seeing all of the work result in fine concerts

What was the least satisfying part of the position ?

Great product but not filling enough seats – attendance

Other Comments:

Symphony needs to be more open to new ideas

More brainstorming at the board level

More events should be in Michigan City – MC Participation has been a challenge

Should increase board size and diversity – diversity is important for grants

Increase board size

Need more MC board members

Need to schedule concert season two years out in general (does not need to be real specific) for grantwriting purposes.

Need a symphony credit card for ordering over the internet and software purchases such as virus updates etc.

Someday we should consider possibly changing the Symphony name to something like Lakeshore Symphony to get rid of the La Porte name and be more inclusive of Michigan City and surrounding area.

LaPorte County Symphony Orchestra Board & Staff 2008-09

Name	Address	Phone	E-Mail	Business	Term Ending
All Board members have three year terms.					
Board of Directors					
Marcia Morris, President	424 Upper Lake Shore Drive LaPorte IN 46350	362-4998	lmorris@csinet.net	Community Leader Owner & Agent General Insurance Services 421 Franklin, Michigan City	2009
Ted Taylor, Vice President	1074 S. Redbud Drive La Porte IN 46350	326-6951 home 362-2113, ext. 2223 work	ttaylor@genius.com	Vice Chance for Advancement Purdue Univ. North Central 1401 S. US 421, Westville	2010
Joe Goepfrich, Treasurer	PNC, 1401 S. US 421 Westville, IN 46391	574.271.9674 home 785-5672 work	jgoepfrich@pnc.edu	Community Leader	2009
Andrea Taylor Secretary	1074 S. Redbud Drive La Porte IN 46350	326-6951 home 326-6951 work	andreataylor@yahoo.com	Community Leader	2010
Dr. Doug Busby	323 N. Timber Ridge Road La Porte, IN 46350	219-362-0532	dougbusby@comcast.net	Medical Consultant President Cannon's Automotive	2011
John Cannon	710 Tyler Street La Porte IN 46350	362-4415 h	john.cannonsauto@verizon.net	Assistant Manager Center Bank	2010
Rose Charo	73 Pine Lake Ave. La Porte, IN 46350	324-6368 ext. 308	rcharo@centier.com	Assistant Manager Center Bank	2011
Christina Dougherty	323 N. Timber Ridge Road La Porte, IN 46350	362-0532 h 219-617-3268 w 362-7575 w, 362-6512 h	crdougherty@comcast.net	Healing Touch Practitioner Attorney	2011
Michael Drayton -- Immediate Past President	820 Jefferson Avenue LaPorte IN 46350	325-0284 f	vmndrayton@csinet.net	Saltwasser & McCain	2009
Yvonne Lindborg	1417 Indiana Avenue La Porte, IN 46350	325-0477 h 219-393-5581 w	king@csinet.net	Kingsbury Elevator Executive Director, Indiana Toll Road	2011
Leigh Morris	424 Upper Lake Shore Drive LaPorte IN 46350	362-4998	lmorris@csinet.net	Executive Director, Indiana Toll Road	2009
John Spiggle	805 Maple La Porte IN 46350	362-8547	john@parkisonhinton.com	Certified Public Accountant	2009
Staff Representatives					
Phil Bauman	7630 Gladstone Dr. Apt. 201 Naperville, IL 60565	630-235-0323 c 630-579-9778 f	phil@philipbauman.com	Conductor/Music Director	
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