

“For the Loved”

Choreography: Amyia Burrell

Music: Make Them Hear You featuring Roderick Dixon

Costumes: Orlando Ballet Wardrobe

Dancers: Noe Leilani and Sean Anderson

2022 1<sup>st</sup> Place Contemporary Pas de Deux

Youth American Grand Prix & United Ballet Competitions



# ORLANDO BALLET

JORDEN MORRIS | ARTISTIC DIRECTOR

Annual Meeting  
June 2, 2022





# ORLANDO BALLET

JORDEN MORRIS | ARTISTIC DIRECTOR

## Governance & Nominating

Skip Kirst, Chair of Governance





# Adoption of Amended and Restated Bylaws



# New Article 2; Section 13

## Director Emeritus

Section 13. Director Emeritus. Director Emeritus board members shall be permanent, non-voting, Board members recommended by the Nominating Committee and elected by a super-majority (as defined herein) of voting members present at the Annual Meeting.

Directors Emeritus must meet the following characteristics to be considered: i) served on the Board with distinction for five (5) or more contiguous years; ii) held key leadership positions or made significant contributions to the success of Orlando Ballet; iii) engaged in major volunteer or advocacy activities in service to the Board; and iv) served as an exemplar of Board service to Orlando Ballet. Directors Emeritus shall be entitled to receive all written notices and information provided to the Board, and to attend all meetings of the Board and Committees on which they serve. Directors Emeritus shall serve as continuing advocates for Orlando Ballet and advisors to the Board and staff as needed.

The Board may remove Directors Emeritus in accordance with the Article II, Section 6 (Removal) herein.



# New Article 4; Section 8

## Immediate Past President

Section 8. Immediate Past President. If recommended by the Nominating Committee and elected by a super-majority (as defined herein) of voting members present at the Annual Meeting, the Immediate Past President shall be a Board member who served the prior fiscal year as President and shall serve a one-year term to counsel and advise the President and Board to facilitate effective transition of leadership.



# Diversity, Equity and Inclusion Policy: Recommended EDI Statement

*At Orlando Ballet we believe that dance is for everyone. That is why we are committed to cultivating an environment that encourages diversity and inclusivity. By fostering authentic experiences, we provide a voice, confidence, and opportunities for all to engage in and be empowered through the universal art of dance. Our dynamic programs entertain, educate, and enrich a diverse spectrum of people and we welcome everyone to learn and experience dance as a window into the world's diverse cultures.*

*Orlando Ballet aspires to be a leader across Central Florida by promoting inclusion within its organization and school and by committing to deliver the art form to every culture and local community.*

*Dance is for everyone.*



# ORLANDO BALLET

JORDEN MORRIS | ARTISTIC DIRECTOR

## Nominating

Jayne Willis, Chair of Nominating





# Directors elected since last Annual Meeting

## *First Term Elections*

Ekta Desai

SchenkelShultz Architecture

## *Second Term Elections*

Marco Santoro

Wells Fargo

David Withee

JP Morgan Private Bank



# Director Re-Elections (3-year terms)

*Directors for Second Terms  
commencing 7/1/22*

Carol Burkett  
Keri Holliday

*Directors for Second Terms  
commencing 1/1/23*

Bettina Buckley  
La Voyce Porter  
Rick Skaggs



# New Director Elections

*First Terms – Commencing 7-1-22*

Angie Jernigan  
Orlando Health

Margaret Shan Atkins  
Community Volunteer



# Election of Officers for 1-year terms

President: Rick Skaggs

Vice President: Jayne Willis

Treasurer: Jean Grono-Nowry

Secretary: Nancy Gibbons

Immediate Past President: Jonathan Ledden



# Executive Committee

Rick Skaggs, President - Chair

Jayne Willis, Vice President

Jean Grono-Nowry, Treasurer

Nancy Gibbons, Secretary

Jonathan Ledden, Immediate Past President

Lynn Le, MD

Jennifer Socarras

Lisa Westlake



# Committees

## Finance

Jean Grono-Nowry, Chair

Angie Jernigan

Jonathan Ledden

Geanne Share

David Withee

Cheryl Collins

Katherine Fabian\*

Kimberly Sydebrant\*

## Governance and Nominating

Lisa Westlake, Chair

Jayne Willis, Nominating Chair

Margaret Shan Atkins

Marcia Hope Goodwin

Skip Kirst

Jonathan Ledden

Jennifer Socarras

Cheryl Collins

Katherine Fabian\*

Ashley Samuels\*

## School

Lynn Le, MD, Chair

David Buxton, MD

Lisa Westlake

Cheryl Collins

Jorden Morris

Phillip Broomhead\*

Jenny Logus\*

Victoria Sarau\*

\* Staff Representative

\*\* Ex-Officio

Note: President is Ex-Officio member of all committees



# Committees (continued)

## Ballet Ball

Jennifer Socarras, Chair

Bettina Buckley

Keri Holliday

Nancy Gibbons

Lynn Le, MD

La Voyce Porter

Cheryl Collins

Dustin Becker\*\*

Lauren Bolick\*\*

Kelly Roberts\*\*

Lizette Valarino\*\*

Ashley Samuels\*

## Stewardship

Ashley Samuels, Chair\*

Margaret Shan Atkins

Ekta Desai

Nancy Gibbons

Angie Jernigan

Krista Ledden

Traci Madara

La Voyce Porter

Marco Santoro

Jennifer Socarras

Cheryl Collins

Thomas Bolick\*\*

## Community Enrichment

Nancy Gibbons, Chair

Carol Burkett

Ekta Desai

Marcia Hope Goodwin

Traci Madara

Geanne Share

Jennifer Socarras

Cheryl Collins

Charmaine Hunter\*

Cat Linder\*

Laurel Hayward\*

\* Staff Representative

\*\* Ex-Officio



# Committees (continued)

## Media & Production Advisory

Sandy Bondorowsky

Bettina Buckley

Tim Kashani

Jonathan Ledden

Krista Ledden

## Strategic & Capital Projects

Jonathan Ledden, Chair

Cheryl Collins

Jorden Morris

## Orlando Ballet Ambassadors

Jennifer Bentson, Co-Chair\*\*

Kelly Roberts, Co-Chair\*\*

## Amigos del Orlando Ballet

Lizette Valarino, Chair\*\*

\* Staff Representative

\*\* Ex-Officio



# Krista Ledden

## Director Emeritus Nominee

- Served with distinction since February 2017
- Exemplary ambassador recruiting countless new donors, students, subscribers and key board members
- Founding Member of Enrichment Committee
- Significant contributor to School Committee
- Pioneered Fitness Thru Dance
- Teaches at OBS free of charge
- Family contribution of over \$2 million to date





# ORLANDO BALLET

JORDEN MORRIS | ARTISTIC DIRECTOR

## Meeting the Mission

Cheryl Collins, CFRE, Executive Director

*Orlando Ballet entertains,  
educates, and enriches through the  
highest quality of dance.*





# 2021 – 22 Accomplishment Highlights

- Artistic Director Transition extremely successful
- Ended Fiscal year in sound position permitting fulfillment of goal to continue moving Dancer wages to National Median and allowing growth of Company for coming season to 26 (from 22)
- Hosted 30,428 guests for mainstage season
- Inaugural performance in Steinmetz Hall including live music – made possible by significant investment of Larry & Sue Costin
- The Great Gatsby performed with live music – made possible by the Elizabeth Morse Genius Foundation
- Refinement of Staff Roles to serve mission in Post-COVID Era and support next period of growth – FY23 Budget projects \$8.3M revenue, continued forward progression from FY22 \$7.2M



# Staff Professional Credentials and Awards Earned

Priority focus on continuing professional development has yielded the following accomplishments this year:

- **Cheryl Collins, Executive Director:**  
Association of Fundraising Professionals (AFP) - Outstanding Fundraising Professional
- **Katherine Fabian, Managing Director:**  
Society for Human Resource Management (SHRM-SCP) — Senior Certified Professional  
Workplace Certificate for DEI (USF Office of Corporate Training & Professional Education)
- **Charmaine Hunter, Director of Community Enrichment:**  
AFP – Impact Award Honoree
- **OBS Faculty:**  
American Ballet Theatre® (ABT) Certification or Recertification
- **Fitness thru Dance Faculty Shane Bland & Marlena Abaza:**  
Initial Certification for BeMoved® and Gentle BeMoved® recreational dance programs



# Contributed Revenue Continued to Grow

- Raised over \$3.1 Million in contributed revenue to support the mission
- Raised over \$1 Million through the **United Arts Collaborative Campaign for the Arts**. Final total was \$1,023,584, representing 18.6% of the overall total raised through the campaign by over 32 participating organizations
- Launched the **Soutenu Society**, a recognition society for planned gifts in support of Orlando Ballet, thanks to the support of three inaugural members:
  - Larry & Sue Costin
  - Krista & Jonathan Ledden
  - Keith McIntyre & Rick Skaggs
- Significant Investment in Philanthropy team to support FY23 growth to \$3.2M annual operating support and soon to be announced New Works Capital project





## Ballet Ball

### A Night With the Great Gatsby

- Sold-out event for approximately 400 attendees
- Raised over \$560,000 in net proceeds (225% to goal) to support the mission
- Exceeded expectations as an immersive, not-to-be-missed fundraising event experience.
- Save the Date: April 15, 2023





# FY23 Contributed Revenue Focus

- Continue to build on the momentum of the **Ballet Ball** to host another record-breaking, immersive fundraising event for the community. Save the Date: April 15, 2023!
- Expand Orlando Ballet's Individual Giving program – **Members of the Barre** - to exceed \$1 million in annual support.
- Expand the **Soutenu Society** to at least 10 members with documented planned gifts to support Orlando Ballet.
- Re-launch the **Elevation Society** to raise up to \$5 Million to support the development of new works in our 2023-24 Season and beyond.



# Entertain: Raised the Barre...

- Elevated Repertoire including infusion of Classical Indian Dance (*Jungle Book*), Jazz and 20s era popular dances (*The Great Gatsby*) and African Fusion (*Lambarena*)
- Ambitious sets, lighting and costumes – extremely high-quality production value for audiences to enjoy
- Three of five mainstage shows included live music
- Five performances were Central Florida premieres



# Engaged With the Community to Expand Audience and Earned Income

## Digital:

### Facebook:

- People Reached Jan-May 2021 (534.3K) vs. Jan-May 2022 (1.2MM)
- Post Link Clicks Jan-May 2021 (562) vs. Jan-May 2022 (2.7K +377%)

### Google:

- Conversion Rate Jan-May 2021 (18.26%) vs. Jan-May 2022 (20.28%)
- Ad Campaign Performance – Revenue Jan-May 2021(\$7.7K) vs. Jan-May 2022 (\$86K)
- Users Jan-May 2021 (246K) vs. Jan-May 2022 (265K)

Instagram Post Engagement up 25.3% year over year

Started a new TikTok Channel

- Likes: 10.8K
- Followers: 1.2K

## Subscriptions:

- 22/23 subscriptions hit 50% to goal on day 21 of being on sale vs 44 days on sale in prior year
- 53% increase in the number of subscribers between FY21 and FY22. (514 in FY21 and 788 in FY22, matching pre-COVID numbers)

## Sales:

- *Giselle* became second highest selling show (non- *Nutcracker*) in OB history
- *The Great Gatsby* is now the fourth highest selling show in this ranking



# Focus Items 2023 – Entertain

Increase value to patrons:

- Return to printed programs
- Enhanced pre-show audience education with Guest Guides for each show
- Pre-talks to further immerse audiences in the artistic experience will become the norm including OB Artistic Leadership and Guest Choreographers, Conductors, etc.



# Educate: OBS Continued to grow

## Operational Accomplishments:

- Surpassed enrollment and tuition goals
- Smooth transition to post COVID studio environment
- Smooth transition to new registration system for 22-23 Registration

## Artistic and Student Achievement:

- Noe Leilani - Academy 2 student in *Giselle*
- Sean Anderson – Student on scholarship for eight years earned scholarship for year-round training program at The Royal Ballet (fall 2022)
- Youth American Grand Prix Regionals (YAGP) overall
  - Best Choreographer – Amyia Burrell
  - Best School - Orlando Ballet
- United Ballet Competition Finals:
  - All seven students who competed placed and five received scholarship offers



# Focus Items 2023 - Educate

## Begin Partnership with Valencia College:

- Dorms – local options for Academy students and beyond
- Possible credits for higher education for current students and to support professional Dancer Career Transition

## Continuing education for faculty:

- Progressing Ballet Technique (PBT) Workshop
- Artists Becoming – Mindfulness and Self Care Focused Program
- Transgender Workshop

## Customer Service:

- Parent access to Harriett's Orlando Ballet Centre restored
- Webinars on all activities at OBS for better communication

## Fitness thru Dance (Recreational Dance):

- Corporate wellness initiatives



# Enrich: Dance is for everyone

Exponential Growth continues across eight programs:

- 120 Residencies providing services programs delivered in FY22
- More than 17,000 community members impacted

STEPS – Scholarship Training for the Enrichment of Primary Students & REACH (for Middle School):

- Traditionally serving 2<sup>nd</sup> – 3<sup>rd</sup> grade students in tri-county area
- Broadened to serve 2<sup>nd</sup> – 8<sup>th</sup> grades, soon in all 7 Central FL Counties
- Total students served this year: 1,610

First STEPS – Arts Integrated Early Childhood Education

- 40 Residencies this year!

RISE – Releve' In Search of Excellence:

- Providing elevated dance training and exposure the Professional Company for OCPS Middle and High School Dance Magnet Students



# Enrich 21-22 Continued...

## Intro to Ballet:

- Partnership with OCPS serving all second-grade students (15,000)
- Expanded to include students from Seminole & Volusia Counties

## Come Dance With Us:

- Dance instruction for those with varying abilities
- Initially, children ages 3 – 6
- Expanded to partnership with UCP for children
- Expanded to Northland Church to offer service to adults

## Neon Club:

- Monthly social dance events for ages 16+ with varying abilities (resumes June 3, 2022 after COVID pause)

## Gentle BeMoved® / BeMoved®:

- Recreational Dance classes for Adults (ages 14+) and Senior Citizens or those with mobility challenges. Pilot programs in the City of Orlando and at the Roth and Rosen JCCs



# Focus Items 2023 – Enrich

There is a clear need for these programs which address a multitude of challenges facing the community.

These issues are addressed through dance arts which serve as a conduit to provide access and inclusion - refocusing students and community members to be more centered, creatively expressive, focused upon self worth and so much more...

Focus for 2023:

- Creation of 3-year plan for strategic growth
- Definition of Need to serve 7 County Area
- Expansion of programs that support diversity amongst dancers and creation of access and opportunity for the underserved
- Identification and training of additional teaching artists



# ORLANDO BALLET

JORDEN MORRIS | ARTISTIC DIRECTOR

## Entertaining with Artistic Excellence

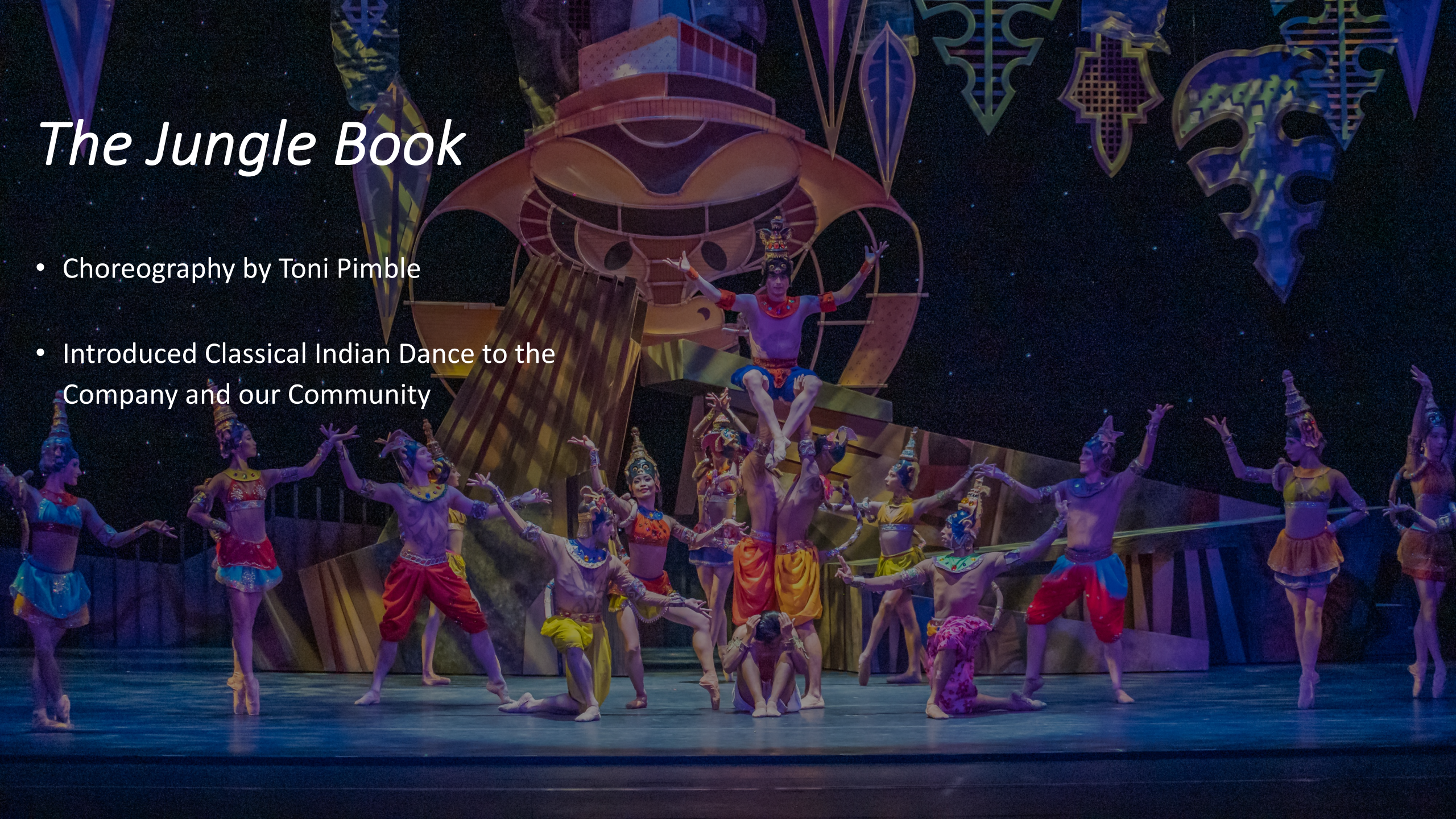
Jorden Morris, Artistic Director





# *The Jungle Book*

- Choreography by Toni Pimble
- Introduced Classical Indian Dance to the Company and our Community





# *The Nutcracker*

- Refreshed Lighting
- Choreographic Updates
- Restoration of Original Scenic Elements
- Refurbishment of props and set pieces





# *Giselle*

- First Performance in Steinmetz Hall
- Classical choreography re-staged by Jorden Morris, Lisa Vinzant, Yan Chen and Phillip Broomhead
- Presented with live music by OPO with guest Ballet Conductor Ramona Pansegrau





# *The Premiere Collection*

- Triple Bill
- Jessica Lang's "Lyric Pieces"
  - Piano score by Edvard Grieg played live by Angelyn Traylor
- Heath Gill's "Confronting Genius"
- Val Caniparoli's "Lambarena"





# *The Great Gatsby*



- Choreography by Jorden Morris
- Original Score by Carl Davis
- Performed by customized jazz orchestra including guitar, banjo, saxophone and drum kit, assembled by Harrich Claassen and conducted by Julian Pellicano



# Orlando Ballet Company 2022-23

- 100 % Retention of returning dancers
- Three dancers from apprentice or second company promoted to Company
- Two dancers promoted from second company promoted to apprentice
- Three new dancers have been contracted
- Growth from 19 Dancers (due to Covid related Visa issues, was budgeted for 22) to 26 Dancers



# *Dracula*

- Choreography by Michael Pink
- Last presented by OB in 2016





# *The Nutcracker*

- Beloved holiday classic presented for the first time in Steinmetz Hall
- Likely last performance of this version of the show
- Farewell performance by Daniel Benevides as Drosselmeyer







# *Moulin Rouge® The Ballet*

- Choreography by Jorden Morris
- Last presented February 2021 in reduced form due to Covid
- Restoring 40 minutes of choreography previously unseen in Orlando
- Will be presented with live music pending ability to raise funds in support



# Director's Choice

- Triple Bill featuring Orlando Ballet's Second Company
- Classical: "Paquita" – to be staged by Phillip Broomhead and Yan Chen
- Contemporary: Emerging Choreographer and Dance Accelerator 2 Winner Natreia Blake will deliver her piece "Break Through"
- Cutting Edge: Audience favorite from *Premiere Collection*, Choreographer Heath Gill will present a new work





# *A Streetcar Named Desire*

- Choreography by Annabelle Lopez Ochoa
- OB is the second ballet company in North America to present this production





# ORLANDO BALLET

JORDEN MORRIS | ARTISTIC DIRECTOR

## President's Report

Jonathan Ledden, President





# ORLANDO BALLET

JORDEN MORRIS | ARTISTIC DIRECTOR

*First of all.....*

*Thank You for the  
opportunity to lead this  
great Board for the last 5  
years.*





# ORLANDO BALLET

JORDEN MORRIS | ARTISTIC DIRECTOR

*There is nothing more difficult to arrange, more doubtful of success, and more dangerous to carry through than to take the lead in the introduction of a new order of things.*

*The innovator makes enemies of all those who prospered under the old order, and only lukewarm support is forthcoming from those who would prosper under the new.*

*- Niccolo Machiavelli*





# Year 5 of Long-Range Plan

## ORLANDO BALLET

**Long Range Planning Materials – Board Discussion  
October 2, 2017**

### AGENDA 2022

1. Perform high quality and broadly appealing Mainstage seasons; including imaginative new works, popular OB revivals and exciting company premieres of entertaining dance and ballet favorites
2. Expand our Outreach and Company presence to better reach the entire Greater Orlando Community
3. Expand Orlando Ballet School to be premiere dance educator in Orlando teaching a variety of styles to all skill and age levels
4. Launch Capital Campaign to build Orlando Ballet's future home, stability and repertoire
5. Open The Orlando Ballet Dance Center by 2020
6. Build our executive, development and marketing organizations to efficiently support the Mission and to substantially expand our audience, student and donor base
7. Operate within our financial means targeting annual surpluses
8. Improve our employee value proposition through expanded HR programs, training, benefits and career pathways
9. Re-imagine Nutcracker and expand its performance season for Steinmetz Hall in 2020
10. Create signature world premiere Full Length for opening of Steinmetz Hall in 2020
11. Earn national recognition of Orlando's cultural excellence and vitality by earning invitation to 2-3 dance festivals over the next five years
12. Leverage newly created works to develop at least two resident relationships outside Orlando
13. ~~Eventually expand our Mainstage season to 5 series, including a dedicated Family Series~~



# Succession is my ultimate achievement

- Boards must be self sustaining and pass “The Beer Truck Test”
- Cults of personality alienate newcomers and frustrate high performers
- No institution will be successful if it is not cultivating and promoting new leaders
- Day-to-day completely managed by Artistic and Executive Directors
- Board now plays traditional role
- Our commitment remains as strong as ever -
  - Chair of Strategic and Capital Projects
  - Current financial commitment continues through 2024
  - Excited to see artistic evolution



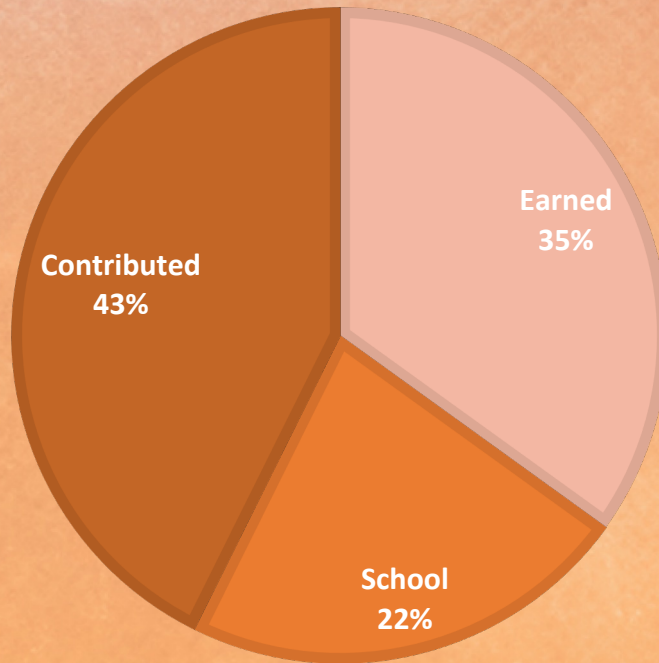
# The Foundation is Complete

- High quality repertoire and strong artistic leadership with vision for the future
- Significantly expanded community outreach
- OBS is flourishing and the premier dance educator in Central Florida
- Harriett's Orlando Ballet Centre is a thriving hub
- We have exceeded financial goals and now have over \$2 million in reserves
- Successful debut in Steinmetz Hall
- Orlando Ballet is ready to move forward with strong leadership

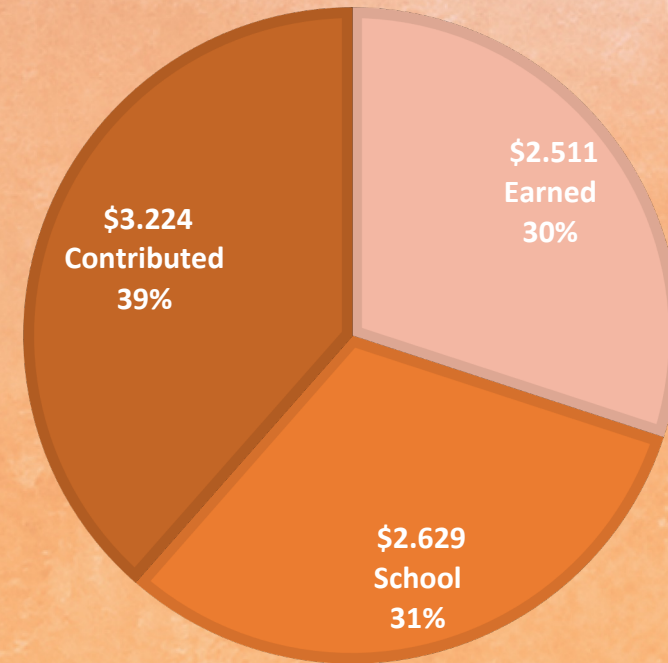


# Income Mix on par with Peer Companies

2019 DUSA AVERAGE



2023B BUDGET (\$MM)

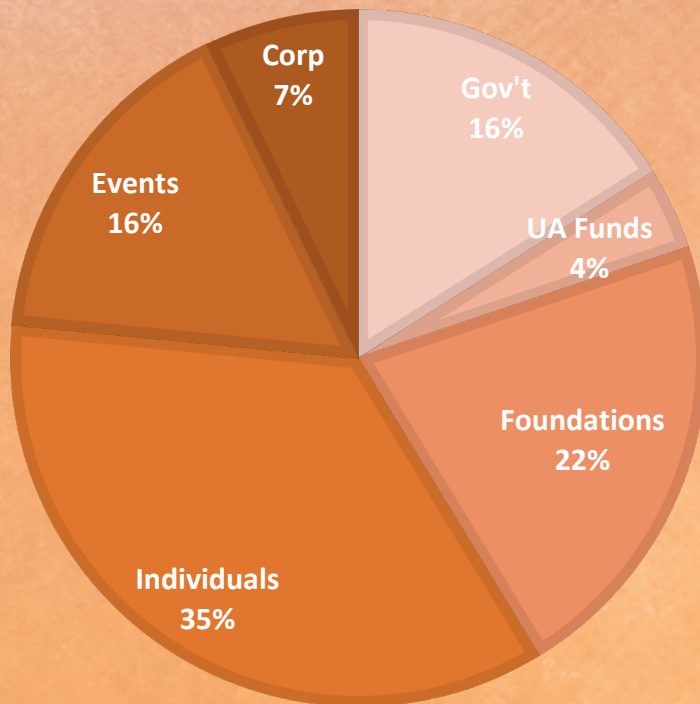


Source: Dance USA 2019 survey of 15 companies with budgets between \$3 - \$14.9 MM

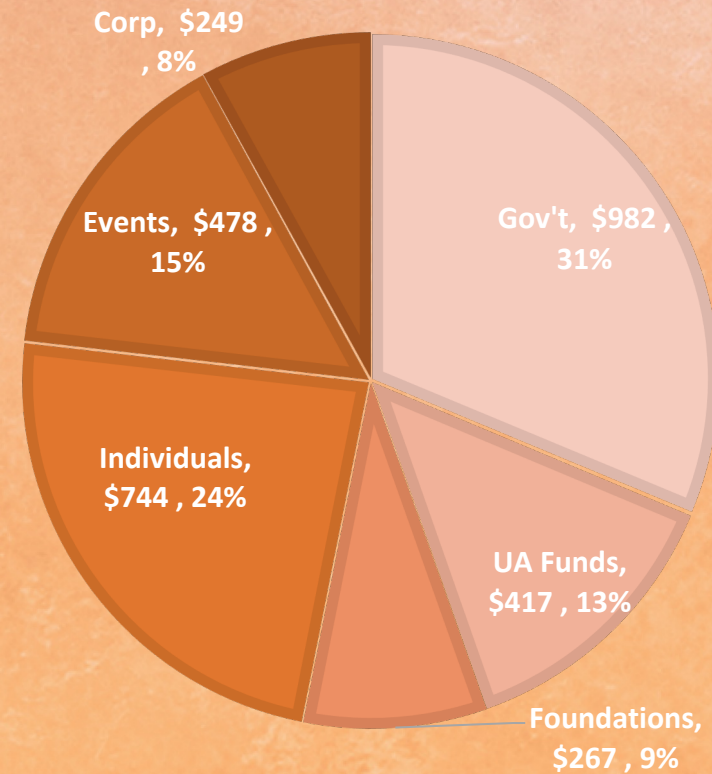


# Contributed Income Mix

2019 DUSA AVERAGE



ORLANDO BALLET FY22E (\$000)

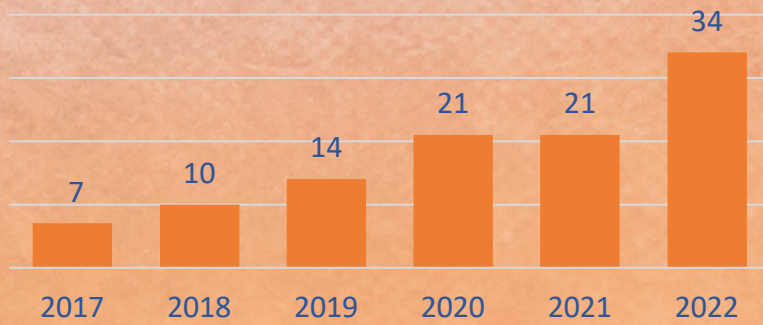


Source: Dance USA 2019 survey of 15 companies with budgets between \$3 - \$14.9 MM. Excludes "other" items such as In-Kind and misc. contributed reflected in DUSA data.

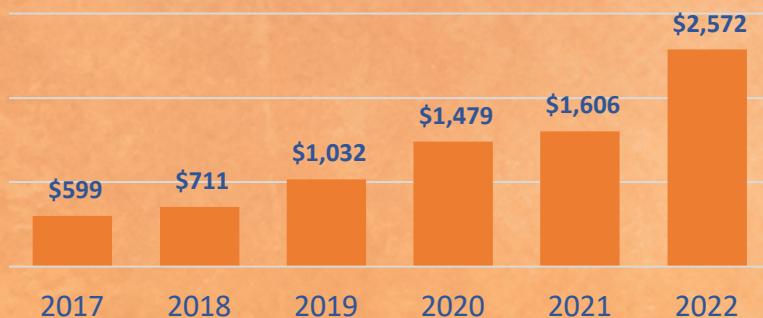


# JL's final call to action: drive individual giving

## Individuals >\$5k



## Overall Average Gift Size



- Significant progress growing donor base since 2017
  - 43% increase of donors
  - 329% increase of average gift size
  - 4x increase in donors giving \$5,000 or more
  - 2.5x increase in \$1,000 donors
- Central Florida is relatively “young” community
  - Highly supportive, but relatively fewer Foundations...for now
  - Corporate giving exceeds national average
- Government is filling a big gap
- **Contributed growth will come from individuals**
  - Fast growing region
  - Individuals have discretion and can act quickly
- A proven “Virtuous cycle” – *ticket buyers > giving > advocacy > increased giving > legacy giving*

*Data reflects giving via United Arts Collaborative Campaign, the primary conduit of Individual Giving.*



# Financially stable AND building our future

	2019A	2020A	2021A	2022PF*	2023B
Total Income (excl. Non-recurring)	\$6,983,666	\$6,433,911	\$5,910,870	\$7,501,044	\$8,364,152
Less: Total Expenses	\$6,786,298	\$6,311,729	\$5,831,665	\$7,080,435	\$8,329,167
= Net Operating Income	\$197,368	\$122,182	\$79,205	\$200,609	\$34,985
Addback: Non-Cash Depreciation	\$62,037	\$262,022	\$376,455	\$380,765	\$381,965
<b>= Operating Cash Flow</b>	<b>\$259,405</b>	<b>\$384,204</b>	<b>\$455,658</b>	<b>\$581,274</b>	<b>\$416,950</b>
YE Operating Cash	\$572,652	\$555,266	\$1,196,948	~\$645,000	+\$645,000
YE Reserves*	\$0	\$235,000	\$575,000	\$2,700,000	\$3,000,000

*\*2022 is estimated pro-forma as of 4/30/22; and excludes a \$1.4 million non-recurring grant. 2022 GAAP financials will reflect \$1.8 million of operating surplus.*

*As of 4/30/22, unrestricted cash on hand was \$2.070 million and Reserves were \$1.275 million. The Board has designated an additional \$1.5 million of excess cash as board restricted reserves.*



# ORLANDO BALLET

JORDEN MORRIS | ARTISTIC DIRECTOR

*Congratulations to everyone  
on a terrific 21-22 season!*

*The future is now....*





# ORLANDO BALLET

JORDEN MORRIS | ARTISTIC DIRECTOR

## The Path Forward

Rick Skaggs, President Elect





# The Future Is Bright

As the 50<sup>th</sup> Anniversary Approaches in FY24, Board and organizational focus turns to “Setting the Course” for the next 50 years:

- Continue the legacy that was set during Jonathan’s term – commitment to organizational transparency and fiscal accountability
- Strategic growth of the board, now focused upon specific skillsets needed to support organizational excellence and continued growth
- Investment in New Works
- Ongoing commitment to Employee Value Proposition – to bring Artists and Staff to median of National Industry compensation



# The Path Forward...

- Ballet Ball – continue as the must attend event in Central Florida, always high quality while delivering new and different immersive experiences for our guests
- Planning now for festivities that will support the 50<sup>th</sup> Anniversary Celebration
- Proactive planning for enhancing and maintaining our home to best serve the mission of OB and the community



# Special Thanks

The entire Orlando Ballet Family wishes to  
thank Krista & Jonathan Ledden for  
five incredibly transformational years.

The chance to recognize you is simply the  
*sweetest thing...* It really is a *beautiful day!*