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#### ABOVE LEFT TO RIGHT:

Ray and Maria Stata Music Director **Andris Nelsons** leads pianist Hélène Grimaud in Brahms' Piano Concerto No. 2.

Queen Latifah with trumpeter Dontae Winslow join Julian and Eunice Cohen Boston Pops Conductor **Keith Lockhart** and **the Boston Pops** on Opening Night.

Deborah and Philip Edmundson Artistic Partner **Thomas Adès** leads the Tanglewood Music Center Orchestra.







#### A MESSAGE FROM THE MANAGING DIRECTOR

On behalf of the musicians, Board members, and staff of Boston Symphony Orchestra, Inc., we are pleased to present this recap of the organization's successful 136th season.

The rich tapestry of offerings by the Boston Symphony, Boston Pops, Tanglewood Music Center, and Tanglewood Festival Chorus once again represented the best that the art form offers. As always, all members of the BSO family—its musicians, donors, subscribers, concertgoers, broadcast audience, volunteers, and staff—make the significant accomplishments of the BSO and its many components possible.

Your dedication to the BSO and its mission ensures that it remains the world's largest orchestral organization in terms of its scope of offerings, and among the finest in the art form worldwide—while offering a wide range of performance, educational, and community programs for more than 1.2 million people. We are grateful for your ongoing support.

Mark Volpe

Eunice and Julian Cohen Managing Director

Ye Volpe





#### THE BOSTON SYMPHONY ORCHESTRA, INC.

The Boston Symphony Orchestra, Inc. engages more people in the remarkable variety and wonder of classical music than any other symphonic organization in the world, bringing music into the lives of millions of people every year. Unmatched in the size and scope of its activities, the BSO remains committed to making classical music of the highest quality accessible to audiences of all ages, from community concerts around Greater Boston to top concert halls around the world.

Known for its diverse programs, passionate performances, and tradition of innovation, the Boston Symphony Orchestra has been at the forefront of artistic excellence for more than 135 years. At home, abroad, and through recordings and broadcasts, the BSO reinforced its reputation as one of the world's most accomplished and versatile ensembles, attracting acclaimed guest artists and conductors. Bank of America and Dell EMC Corporation continued their partnership as BSO Season Co-Sponsors in 2016–17.

For more than 130 years, "America's Orchestra" has led the way in programming that makes classical and popular music accessible and relevant to today's listening audiences. Along the way, it has grown into the most recorded and arguably the most beloved orchestra in the country. Traditionally, the orchestra's repertoire is built on its storied legacy of performing appealing programs that combine light symphonic favorites, American classics, film and Broadway hits, and a wide variety of pop, jazz, indie rock, big band, and country music. The Pops' long time partner, Fidelity Investments, returned once again as the sponsor of the entire 2016–17 season.

Hailed as America's premier summer music festival, Tanglewood provides a sublime experience of musical performances of the highest artistry amidst the pastoral beauty of the Berkshire Hills. As always, the heart of the Tanglewood season is the BSO in performances of orchestral masterworks led by some of the world's great conductors. The Tanglewood Music Center offers a wide array of spectacular performances by its talented Fellows, who spend the summer working with many of the classical music world's finest artists, including members of the Boston Symphony and guests of the BSO.

#### ABOVE LEFT TO RIGHT:

2017 Koussevitzky Artist **Garrick Ohlsson** performs *Schubert's Summer Journey, Program 4* in
Ozawa Hall.

Ray and Maria Stata Music Director Andris Nelsons leads the BSO and Tanglewood Festival Chorus in Bach's Mass in B Minor.

Leslie Odom, Jr. performs with Julian and Eunice Cohen Boston Pops Conductor Keith Lockhart and the Boston Pops.

Ray and Maria Stata Music Director Andris Nelsons conducts the BSO in Wagner's *Das Rheingold*.

# 2016–2017: A Season in Review

By Anthony Fogg, William I. Bernell Artistic Administrator and Director of Tanglewood











With offerings ranging from grand opera to intimate chamber music, from the cornerstones of the orchestral repertoire to intriguing new scores, from the best of contemporary American musical theater to Pops classics—the 2016–17 concert season was characterized by its extraordinary range and breadth. Andris Nelsons in his third season as Ray and Maria Stata Music Director and Keith Lockhart in his 22nd year as Julian and Eunice Cohen Boston Pops Conductor both continued to inspire musicians and audiences, alike.

The 2016–17 BSO season boasted an extraordinary array of today's greatest pianists, including Radu Lupu, Mitsuko Uchida, Yefim Bronfman, Menahem Pressler, Hélène Grimaud, Lang Lang, and Kirill Gerstein. Nelsons' ongoing cycle of Strauss operas continued with *Der Rosenkavalier*, featuring a spectacular cast led by Renée Fleming and Susan Graham. Nelsons and the orchestra also performed all four Brahms symphonies, later releasing them as live recordings to considerable acclaim on BSO Classics. Complementing this project was another installment in the series of Shostakovich symphonies for Deutsche Grammophon, which received a second consecutive Grammy Award in 2017.

Nelsons also conducted three major works of the choral repertoire: Brahms' *A German Requiem*, J.S. Bach's Mass in B minor, and the Mozart Requiem. Each featured the Tanglewood Festival Chorus (TFC) led by James Burton who was appointed Alan J. and Suzanne W. Dworsky BSO Choral Director and Conductor of the TFC. Also appearing for the first time as Deborah and Philip Edmundson Artistic Partner, Thomas Adès dazzled audiences and musicians with his extraordinary skills as conductor, pianist, and composer.

Adès' *Totentanz* was just one of several exceptional new works that the BSO played in the 2016–17 season. Adding to its important legacy of commissioning, the orchestra premiered new scores by Eric Nathan, Timo Andres, George Benjamin, Julian Anderson, and Matthias Pintscher, while Sofia Gubaidulina composed a deeply moving new concerto for the orchestra and a trio of soloists, which was a centerpiece of the season's Carnegie Hall presentations.

Returning for concerts in the 2016–17 season were the BSO's beloved LaCroix Family Fund Conductor Emeritus Bernard Haitink and François-Xavier Roth, while Jakub Hrůša and Alain Altinoglu made impressive debuts with the orchestra, and BSO principal musicians gave brilliant solo concerto performances in a program conducted by Anna E. Finnerty BSO Assistant Conductor Ken-David Masur.

Under Lockhart's direction, the Boston Pops' traditional holiday performances with the TFC remained an iconic celebration for families throughout New England. During the spring season, the Pops presented a season-long tribute to George and Roberta Berry Boston Pops Conductor Laureate John Williams' film music, which produced the CD *Lights, Camera* ... *Music! Six Decades of John Williams* 

released on BSO Classics. The season also featured a diverse slate of guest artists, including Queen Latifah, Leslie Odom, Jr., Ben Folds, and the B-52s, while favorites Gospel Night and John Williams' Film Night returned.

The 2017 Tanglewood season was bookended with acclaimed popular artists, including James Taylor, Joan Baez, Mary Chapin Carpenter, Diana Ross, and—in his first Tanglewood performance—Sting.

The Boston Pops and Lockhart presented *Sondheim on Sondheim*, a tellingly intimate portrait of the composer through his own words and a sampling of his finest works. Later in the summer, the Pops realized John Williams' score to *E.T. the Extra-Terrestrial*, screened live with orchestra, for the popular John Williams' Film Night, featuring Andris Nelsons, who not only conducted, but also made an unannounced appearance as trumpet soloist in part of Williams' score to *Lincoln*.

Nelsons spent five weeks at Tanglewood this year, including concerts with the Tanglewood Music Center (TMC) ensembles—as both trumpeter and conductor—the Boston Pops, and the Boston Symphony. High on the list of memorable performances by the BSO and Nelsons were the season-opening performance of Mahler's Symphony No. 2, a concert performance of Wagner's *Das Rheingold* (with a stellar cast led by Thomas Mayer, Stephanie Blythe, and Kim Begley), and a deeply felt performance of Beethoven's 9th symphony to close the BSO season.

Tanglewood annually enjoys appearances by many of today's leading conductors and soloists, and the 2017 season was no exception, including Yo-Yo Ma, Yefim Bronfman, Garrick Ohlsson (the 2017 Koussevitzky Artist), Anne-Sophie Mutter, Daniil Trifonov, and Joshua Bell. Making an exceptional debut was 15-year-old violinist Daniel Lozakovich.

Pianist Emanuel Ax curated a highly acclaimed series of recitals entitled *Schubert's Summer Journey* featuring a selection of the composer's major chamber and vocal works alongside works he inspired. In an intriguing project, Pierre-Laurent Aimard and Fellows of the Tanglewood Music Center played all of Messiaen's monumental piano cycle, *Catalogue of the Birds*, as the focus of a three-day exploration of music and birdsong organized jointly with the Mass Audubon Society, which included performances at Lenox's Pleasant Valley sanctuary.

TMC Fellows were immersed in an extraordinary diverse range of repertoire and projects all summer, ranging from centennial tributes to Ella Fitzgerald and Lou Harrison, to the musical peaks of Strauss' *An Alpine Symphony* with Andris Nelsons, to an intense collaboration with Thomas Adès. The annual Festival of Contemporary Music was devised by three young artists, Kathryn Bates, Jacob Greenberg, and Nadia Sirota, who programmed an exceptionally eclectic sampling of today's compositional voices. In many ways the heart of Tanglewood, the TMC and its young musicians are witnesses to Serge Koussevitzky's description of great music as the "central line" of our lives.

#### **OPPOSITE LEFT TO RIGHT:**

Ray and Maria Stata Music Director Andris Nelsons congratulates composer Sofia Gubaidulina from the stage following the world premiere performance of her Triple Concerto.

George and Roberta Berry Boston Pops Conductor Laureate John Williams leads the Boston Pops at the annual Film Night.

Colin Jacobsen, Emanuel Ax, and Yo-Yo Ma perform Schubert's Piano Trio No. 1 at Tanglewood.

# The 2016–17 concert season was characterized by its extraordinary range and breadth.



New and Archival Releases Trace BSO and Pops Legacy The BSO has been recording orchestral masterpieces since 1917—now, more than 100 years and thousands of releases later, the BSO and Boston Pops are among the most recorded ensembles in history, with a tradition that continues today in the form of several new releases that showcase various repertoire from both orchestras.

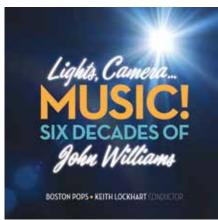
Two recently released archival box sets feature the BSO extensively. The 57-CD *Boston Symphony Orchestra: The Complete Recordings* on Deutsche Grammophon traces the label's entire legacy of BSO recordings spanning from 1969–2017. Among the rich trove of archival recordings, including several previously unreleased recordings under Seiji Ozawa, is a new recording of Shostakovich's Symphony No. 6 led by Ray and Maria Stata Music Director Andris Nelsons, the latest installment in Nelsons' award-winning Shostakovich cycle with the BSO.

Another archival box comes by way of Sony Classical with the release of *Charles Munch: The Complete Album Collection*, a new reissue of all the recordings that Munch made for RCA Victor during his 13-year tenure as the BSO's music director. The massive 86-CD box set marks the first time that this catalogue has been available in a single box with 16 works new to CD and 29 newly remastered from the original analogue tapes. The recordings give a comprehensive insight into the orchestra's power as the world's finest interpreter of the French repertoire for which Munch was known.

Beyond the archival releases, the BSO has also garnered praise for its current recording projects. The BSO's second recording on DG in the *Shostakovich Under Stalin's Shadow* series, featuring Symphonies 5, 8, and 9, as well as incidental music from *Hamlet*, won the Grammy Award for Best Orchestral Performance in February 2017, the second consecutive year in which the BSO garnered a Grammy Award for Best Orchestral Performance.







Lest one think that Shostakovich is all (or most) of the BSO's current recorded output, the orchestra and Nelsons issued the complete Brahms symphonies on its own BSO Classic label. The three-disc set, recorded live at Symphony Hall, follows in the footsteps of two such sets recorded previously by the BSO, under Erich Leinsdorf in the mid-1960s and LaCroix Family Fund Conductor Emeritus Bernard Haitink in the early 1990s.

Not to be outdone, the Boston Pops—arguably the most recorded ensemble in history—and Julian and Eunice Cohen Boston Pops Conductor Keith Lockhart released a tribute to George and Roberta Berry Boston Pops Conductor Laureate John Williams with *Lights, Camera* ... *Music! Six Decades of John Williams*. This new recording showcases the remarkable diversity of his film music with selections dating from 1968 to 2015. Recorded live in Pops concerts, the disc encompasses both the familiar (*Star Wars*) and the rare (*The Towering Inferno, Sleepers*), but all a testament to Williams' scoring genius.

Finally, and continuing in the cinematic vein, members of the Boston Symphony Orchestra recorded the soundtrack to *BOSTON*, the first-ever full-length documentary film about the Boston Marathon. Emmy Award-winning composer Jeff Beal, best known for his score to the hit series *House of Cards*, composed the soundtrack and conducted the BSO players in the recording at Symphony Hall in February 2017.

If history is any indication, these recording projects—both new and archival—are yet another chapter in both ensembles' long legacy of recorded sound, and a precursor to many more that will continue to add to their already incredible discographies of the finest orchestral performances.

#### ABOVE LEFT TO RIGHT:

Ray and Maria Stata Music Director Andris Nelsons and the Boston Symphony Orchestra pose with the first of two consecutive Grammy Awards the BSO has received for Best Orchestral Performance.

Boston Symphony Orchestra: The Complete Recordings was released as an archival box set on Deutsche Grammophon featuring 57 CDs.

Julian and Eunice Cohen Boston
Pops Conductor Keith Lockhart
and the Boston Pops recorded Lights,
Camera....Music! Six Decades of John
Williams as a tribute to George
and Roberta Berry Boston Pops
Conductor Laureate John Williams.



Boston Pops
Takes Over
July 4 Concert
Planning and
Production

Millions of Americans celebrate Independence Day by sitting on the Esplanade or tuning in to the *Boston Pops Fireworks Spectacular* on July 4. But what few of those delighted fans realized was that the 44th presentation of the concert in 2017 was actually the first of its kind—the inaugural July 4 event that was produced entirely by the BSO.

For 43 years, BSO Life Trustee David Mugar produced the show, on which he had originally collaborated with legendary Boston Pops conductor Arthur Fiedler. In the early 1970s, Mugar approached Fiedler with the idea to improve the existing July 4 free concert, adding the now-iconic rendition of Tchaikovsky's 1812 Overture with cannon and church bells to accompany fireworks over the Charles River. Over the decades, his concept for a celebratory concert came to define how Independence Day was celebrated in Boston and throughout America, with national television broadcasts bringing the concert into homes for millions.

After completing the 2016 event, Mugar announced his retirement from his producer post, and passed the baton to the Boston Pops. In doing so, Mugar took on an advisory role, and two of the show's perennial executive producers, Pamela Picard and Richard MacDonald, joined the Boston Pops staff to manage the planning and operations for the 2017 incarnation.

One major benefit of the BSO overseeing the concert is the freedom to direct the creative and programmatic elements that were often driven by national television agreements in past years. The new arrangement allows for more artistic freedom for the Pops, and the ability to select guest performers and repertoire that play to the Pops' strengths to make for a stronger show overall. Working with Julian and Eunice Cohen Boston Pops Conductor Keith Lockhart and Pops Director of Artistic Planning Dennis Alves, Picard and MacDonald helped to create a celebratory, fun, and patriotic show in 2017 that would also take advantage of the new creative freedom, by featuring pop sensation Andy Grammer, American folk rock singersongwriter Melissa Etheridge, and *Hamilton* star Leslie Odom, Jr. joining Lockhart and the Pops. In addition, Alan Menken, the iconic musical theater and film score composer, and Tony Award-winning lyricist Jack Feldman composed a new work, "The Sum of Us," that received its world premiere on the Esplanade, sung by famed Broadway performer Brian Stokes Mitchell.

#### **OPPOSITE LEFT TO RIGHT:**

The crowd cheers, as the **Boston Pops** perform the iconic *1812 Overture.* 

Eunice and Julien Cohen Managing Director Mark Volpe, Bloomberg's Al Mayers, Julien and Eunice Cohen Boston Pops Conductor Keith Lockhart, Eaton Vance's Tom Faust, Bloomberg's Alix Steel, and Governor Charlie Baker announce the BSO's plans for the Boston Pops Fireworks Spectacular.

Audience members show their patriotic spirit during the *Boston Pops Fireworks Spectacular*.



#### THE BOSTON POPS FIREWORKS SPECTACULAR DREW NEARLY

### 450,000 ATTENDEES

AND SOME **2 MILLION**BY TELEVISION, RADIO AND ONLINE BROADCASTS.

However, no matter how engaging the show, the massive artistic undertaking required sponsorship to allow for the ambitious performance. To that end, the Pops partnered with Eaton Vance, a leading global asset manager based in Boston, as presenting sponsor, and Bloomberg, the global business and financial information and news leader, as major sponsor and media partner. Bloomberg helped to bring the beloved Fourth of July celebration to a far-reaching national and international viewership with more than 2 million people tuning in on Bloomberg Television, radio, Bloomberg.com, and on the Bloomberg mobile app.

And though the event is one of the country's premier July 4 celebrations, closer to home, it is also a thriving economic engine for the city and state. With nearly 450,000 people coming to Boston to participate in person, the *Fireworks Spectacular* produces an estimated \$23 million increase in economic activity for the city of Boston, and \$15 million for the Commonwealth of Massachusetts (see page 14). Much of that boost comes from tourism—the event's draws 78% of its attendees from outside Suffolk County and 11% from outside Massachusetts.

And for all those visitors, those native to Boston, and the many tuning in around the world, though the 1812 Overture, the cannons, and the fireworks all may have seemed familiar, the first BSO-produced event was a new chapter in its history—one that continues to define a longstanding Boston tradition.

## COLLABORATION and INNOVATION



New Artistic Leadership Joins the BSO Family The 2016–17 season saw the beginning of two exciting partnerships for the BSO: a new leader for the Tanglewood Festival Chorus (TFC) and first-ever BSO Choral Director; and a three-year artistic partnership with one of the most versatile and creative personalities in classical music today.

In February of 2017, conductor and composer James Burton was named Alan J. and Suzanne W. Dworsky BSO Choral Director and Conductor of the Tanglewood Festival Chorus. He is the first BSO Choral Director and the second Conductor of the TFC. Prior to his appointment, the Tanglewood Festival Chorus was conducted by the late John Oliver, who founded the chorus in 1970 and retired in 2015. Oliver assumed the Donald and Laurie Peck Master Teacher Chair at the Tanglewood Music Center and was also TFC Conductor Laureate.

Burton's primary duties as Conductor of the Tanglewood Festival Chorus include auditioning, selecting, and preparing the chorus for performances with the Boston Symphony Orchestra and Boston Pops. The position also includes fill-in coverage for Ray and Maria Stata Music Director Andris Nelsons and guest conductors, as well as advising during the planning process and around performance activities of the TFC. As the inaugural BSO Choral Director, Mr. Burton will consider new opportunities that would benefit the overall institution by encouraging a broader engagement with choral singing.

"I believe that singing is one of the greatest of all human endeavors, not least when voices are joined together in a true harmony," says Burton. "For me to be given the role of bringing great choral music to Boston Symphony audiences at Symphony Hall and Tanglewood is a wonderful privilege."

Mr. Burton began his work with the TFC at the start of the 2017 Tanglewood season and his initial contract runs through the end of the BSO's 2021–22 season.





The 2016–17 season was also the first year of a multi-dimensional collaboration between the BSO and highly acclaimed English composer, pianist, and conductor Thomas Adès. Continuing for three years through the 2018–19 season, Adès will be the Deborah and Philip Edmundson Artistic Partner, participating in the artistic work of the BSO in a variety of roles reflecting his many gifts. The BSO has been performing Mr. Adès' work since 1998, and he has been a regular guest with the Symphony since 2011.

Starting his tenure as Artistic Partner in the fall of 2016, Mr. Adès has conducted the Symphony in performances of his own *Totentanz* and *but all shall be well* at Symphony Hall and Tanglewood, appeared as a piano soloist, and began collaborations with the Boston Symphony Chamber Players.

Adès is also scheduled to direct the Festival of Contemporary Music at Tanglewood in 2018 and 2019; join the TMC Faculty from 2017–19; and conduct the world premiere of his BSO commissioned piano concerto with soloist Kirill Gerstein during the 2018–19 season.

The addition of these two influential artists, especially considered in combination with the BSO's already stellar list of conductors and artistic leadership, further solidifies the BSO's commitment to remaining at the forefront of world orchestras now and well into the future.

#### ABOVE LEFT TO RIGHT:

Deborah and Philip Edmundson Artistic Partner **Thomas Adès** led the **BSO** at Tanglewood in a program of Britten, Beethoven, and one of his own works.

Alan J. and Suzanne W. Dworsky BSO Choral Director and Conductor of the Tanglewood Festival Chorus James Burton and Ray and Maria Stata Music Director Andris Nelsons collaborate ahead of upcoming BSO performances.

"I believe that singing is one of the greatest of all human endeavors, not least when voices are joined together in a true harmony." –James Burton







New Study Shows Increasing Economic Benefits of BSO Activities The BSO has long been an important player in the cultural and artistic identity of Massachusetts. This year, the BSO commissioned a study to document another kind of role played by the BSO: the impact its presence has on the economy of Suffolk County, Berkshire County, and the Commonwealth of Massachusetts as a whole.

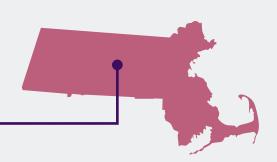
Conducted by Stephen Sheppard, Ph.D. of Williams College Center for Creative Community Development, this economic impact study found that the BSO adds more than \$261 million per year to the total economic output of Massachusetts. Compared to a similar study completed in 2008, the economic impact of the BSO has grown by 40 percent, or more than \$74 million, even after adjustment for inflation. The amplified economic activity attributable to the BSO generates more than \$48 million in federal, state, and local tax revenues.

In Suffolk County alone, which is predominantly the City of Boston, the BSO is responsible for an estimated \$148 million in increased economic activity and \$18 million in additional tax revenue. An estimated 846,600 attendees come to Boston-based BSO and Pops events, most (77%) of whom come from outside of Suffolk County, and some (11%) of whom come from outside of Massachusetts. Visitor spending resulted in an increased economic output of \$34 million for Suffolk County and \$13 million for the Commonwealth.

BSO OPERATIONS AND PERFORMANCES INCREASE THE LEVEL OF ECONOMIC ACTIVITY IN THE STATE OF MASSACHUSETTS:

# MORE THAN \$261 MILLION

is added per year to total economic output.



The July 4 Boston Pops Fireworks Spectacular and July 3 performance draw some of the largest crowds, with audiences in Boston watching from the Hatch Shell, along the Charles River Esplanade, and on jumbo screens in Cambridge. This event alone produces an estimated \$23 million increase in economic activity for Boston, not to mention \$15 million in the Commonwealth of Massachusetts. The activity surrounding the Fireworks Spectacular supports more than 259 jobs in Suffolk County, an additional \$12 million in labor earnings.

In the Berkshires, the fiscal impacts of the BSO's operations at Tanglewood are also significant. More than 350,000 people attend Tanglewood concerts each summer, the majority of whom come from outside of Berkshire County, with almost half (49%) of them coming from out of state. Visitor expenditures generate more than \$43 million in economic activity for Berkshire County along with at least \$15 million in federal, state, and local tax revenues. The construction of new Tanglewood Music Center/Tanglewood Learning Institute buildings is expected to raise the economic activity impact to \$127 million, create several hundred jobs, and \$3 million in tax revenues during the construction period.

The presence of Tanglewood also affects the property and housing markets of Berkshire County. Second homeowners attracted to the region primarily by Tanglewood pay more than \$13 million per year in residential property taxes to communities in Berkshire County, an important source of revenue for local governments. According to a report by Airbnb, Berkshire homeowners earned nearly \$2 million this summer by renting to Tanglewood performers, staffers, and concertgoers.

With hundreds of thousands of visitors comprising an important component of tourism in the Berkshires and Boston, the BSO is proud to be providing an important cultural attraction that gives back to the people of Massachusetts.

#### **OPPOSITE LEFT TO RIGHT:**

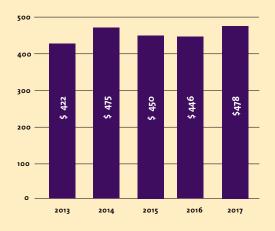
Patrons gather in Ozawa Hall during Tanglewood's Family Concert, geared to children ages 3–8 and their families.

BSO musicians perform at Aeronaut Brewing Company as part of the ongoing Community Chamber Concert series.

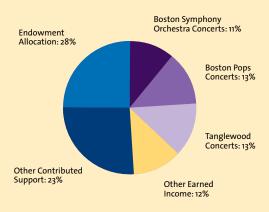
Germeshausen Youth and Family Concerts Conductor Thomas Wilkens engages with the audience during a BSO Family Concert.

#### TOTAL ENDOWMENT INVESTMENTS

As of August 31, 2017 (in millions of dollars)

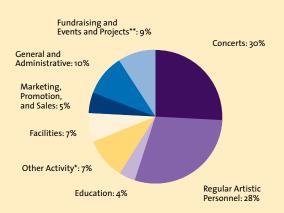


#### FY2017 TOTAL REVENUES\*



\*Revenue as percentage of total revenue

#### FY2017 TOTAL EXPENSES\*



- \* Other includes electronic media, tours, and other expenses
- \*\* Includes events and projects, sponsorship, and campaign-related expenses

Audited Financial Statements are available upon request by contacting the BSO's Business Office at 617-638-9220.

#### TREASURER'S STATEMENT

The Boston Symphony Orchestra ended its most recent fiscal year with an increase in total net assets of approximately \$51.6 million, benefiting from the strong performance of its endowment investments. Total assets approached \$595 million, an increase of 7%, while net assets grew to almost \$511 million at year end, an 11% increase. These assets continue to provide the foundation for artistic excellence, community initiatives, and audience development. Generous gifts and bequests over the years have resulted in an endowment and other investments, together with beneficial interest in trusts, that total more than \$488 million. Liabilities totaled \$84 million, a decrease of 15%, as the gradual mitigation of the effect of low interest rates, as well as the improved investment performance of the pension funds, reduced the related liability.

Despite the inherent strength of the organization, the BSO faces significant financial challenges as it continues to create performances and provide educational and training programs at the highest level of excellence. We ended our last fiscal year with a \$4.4 million deficit from BSO operations, very close to the planned deficit of \$4.5 million. During FY2017 we assumed control of Boston 4 Celebrations Foundation (B4) for the purpose of conducting the July 4 activities on the Esplanade. First year operations resulted in an additional deficit of \$700,000 that is not expected to be repeated in FY2018.

Operating revenue from concert ticket sales, tours, and related activities grew by 2% over last year and provided approximately half of what was needed to cover our costs. We rely on annual support and our endowment draw for the remainder. Annual contributions increased by 10% over last year. Expenses increased by 8% over last year, with much of this increase resulting from the B4 operations.

Though the organization operated in accordance with its plan, this last fiscal year marked the second consecutive year of deficit spending, and the third year of deficit spending within the last five years. A somewhat smaller deficit is planned for the next fiscal year.

With the generosity of our donors and passion of our audiences, we are committed to meeting the financial challenges posed by our operating environment. The organization's ongoing cost containment efforts include steps to reduce health insurance costs, limit increases in fixed expenses, and reduce the effects of market volatility by freezing the staff pension plan. The Board and management continue to use a multi-faceted approach to identify the resources necessary to address our undercapitalization and return to a balanced annual operating budget.

We appreciate your continued involvement with and support of the Boston Symphony Orchestra.

Theresa M. Stone

Therewall glone

Treasurer

#### **FINANCIAL HIGHLIGHTS**

<b>SUMMARY OF FINANCIAL POSITION</b> (in thousands of dollars)	2017	2016
ASSETS		
Cash and cash equivalents	\$ 17,839	\$ 18,481
Pledges and other receivables, net	26,376	26,878
Prepaid expenses and other net assets	3,083	3,286
Investments	477,750	446,379
Assets of split-interest agreements	10,956	9,701
Property and equipment	58,979	53,584
TOTAL ASSETS	594,983	558,309
LIABILITIES AND NET ASSETS		
Accounts payable and accrued expenses	12,944	10,431
Advance ticket sales and other receipts	10,232	10,617
Liability for pension and related benefits	51,226	68,271
Notes payable	10,000	10,000
Total liabilities	84,402	99,319
Unrestricted assets	66,285	44,513
Temporarily restricted assets	227,344	203,300
Permanently restricted assets	216,952	211,177
Total net assets	510,581	458,990
TOTAL LIABILITIES AND NET ASSETS	594,983	558,309
$\textbf{SUMMARY OF OPERATING RESULTS/CHANGES IN NET ASSETS} \ (in thousands of dollars)$	2017	2016
OPERATING REVENUES		
Concerts and tours	\$ 38,456	\$ 37,932
Education and other	8,859	8,590
Total operating revenues	47,315	46,522
OPERATING EXPENSES		
Orchestra and concert production	65,517	60,657
Education and other	11,447	11,021
Marketing, promotion and sales	4,845	4,325
General and administrative	10,634	9,760
Total operating expenses	92,443	85,763
DEFICIENCIES FROM OPERATIONS	(45,128)	(39,241)
SUPPORT		
Annual contributions	22,216	20,220
Fundraising and sponsorship expenses	(7,892)	(7,847)
Fundraising events and projects (net)	1,479	1,264
Endowment allocation	24,173	23,637
	39,976	37,274
Net support	•	
CHANGES IN NET ASSETS	,	
CHANGES IN NET ASSETS Decrease in unrestricted net assets from operations	(5,152)	
CHANGES IN NET ASSETS  Decrease in unrestricted net assets from operations Increase (decrease) in unrestricted net assets from non-operating activity	26,924	(16,046)
CHANGES IN NET ASSETS  Decrease in unrestricted net assets from operations Increase (decrease) in unrestricted net assets from non-operating activity Increase (decrease) restricted net assets	26,924 24,044	(1,846)
CHANGES IN NET ASSETS  Decrease in unrestricted net assets from operations Increase (decrease) in unrestricted net assets from non-operating activity	26,924	(1,967) (16,046) (1,846) 3,574

ATTENDANCE 2016–2017 SEASON		
BSO CONCERTS	CONCERTS	ATTENDANCE
BSO Winter Season (a)	92	195,790
Boston Pops (b)	105	215,320
Tanglewood (BSO Events)	36	195,170
Youth and Family Concerts and Open Rehearsals	14	24,200
Esplanade and Community Concerts	4	425,600
	251	1,056,080
BSO-PRODUCED CONCERTS		
Chamber Players (c) and ensemble performances (d)	21	6,680
Seiji Ozawa Hall Recital Series	17	23,360
Popular Artists/Radio Shows	11	102,550
Shed Recitals/Visiting Ensembles	1	6,070
Tanglewood Music Center	27	15,390
-	77	154,050
TOTAL	328	1,210,130

(a) includes subscription and North America Tour concerts
(b) includes Spring and Holiday Pops at Symphony Hall, and runout concerts
(c) includes Chamber Players concerts in Boston at Jordan Hall and at Tanglewood
(d) includes Community Chamber Concerts and other performances

#### TRUSTEES AND OVERSEERS OF THE BOSTON SYMPHONY ORCHESTRA, INC.

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Marillyn Zacharis

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Diana Osgood Tottenham Paul M. Verrochi David C. Weinstein James Westra Mrs. Joan D. Wheeler Margaret Williams-DeCelles Richard Wurtman, M.D.

‡ Deceased as of August 31, 2017

Lists reflect membership from September 2016 to August 2017

Names in bold signify new Overseers in 2016–17

#### **BOSTON SYMPHONY ORCHESTRA 2016-17**

ANDRIS NELSONS

Ray and Maria Stata Music Director endowed in perpetuity

**BERNARD HAITINK** 

LaCroix Family Fund Conductor Emeritus endowed in perpetuity

SEIJI OZAWA

Music Director Laureate

THOMAS WILKINS

Germeshausen Youth and Family Concerts Conductor endowed in perpetuity

THOMAS ADÈS

Deborah and Philip Edmundson Artistic Partner

**FIRST VIOLINS** 

Malcolm Lowe Concertmaster Charles Munch chair,

endowed in perpetuity

Tamara Smirnova

Associate Concertmaster
Helen Horner McIntyre chair,
endowed in perpetuity

Alexander Velinzon Associate Concertmaster Robert L. Beal, Enid L., and Bruce A. Beal chair, endowed in perpetuity

Elita Kang Assistant Concertmaster Edward and Bertha C. Rose chair, endowed in perpetuity

Dorothy Q. and David B. Arnold, Jr., chair, endowed in perpetuity

Ikuko Mizuno

Ruth and Carl J. Shapiro chair, endowed in perpetuity

Bo Youp Hwang

John and Dorothy Wilson chair, endowed in perpetuity

Nancy Bracken \*
Mary B. Saltonstall chair,
endowed in perpetuity

Aza Raykhtsaum \*
Catherine and Paul Buttenwieser
chair

Bonnie Bewick \*
Kristin and Roger Servison chair

James Cooke \*
Donald C. and Ruth Brooks Heath
chair, endowed in perpetuity

Victor Romanul \*
Ronald G. and Ronni J. Casty chair

Catherine French \*

Jason Horowitz \*
Ala Jojatu \*

Bracha Malkin \*

**SECOND VIOLINS** 

Haldan Martinson Principal Carl Schoenhof Family chair, endowed in perpetuity

Julianne Lee Assistant Principal Charlotte and Irving W. Rabb chair, endowed in perpetuity

Sheila Fiekowsky Shirley and J. Richard Fennell chair, endowed in perpetuity

Nicole Monahan David H. and Edith C. Howie chair, endowed in perpetuity

Ronan Lefkowitz

Vyacheslav Uritsky \*

Jennie Shames \*

Valeria Vilker Kuchment \*

Tatiana Dimitriades \*

Si-Jing Huang \*

Wendy Putnam \*

Robert Bradford Newman chair, endowed in perpetuity

Xin Ding \*

Glen Cherry \*

Yuncong Zhang \*

**VIOLAS** 

Steven Ansell Principal Charles S. Dana chair,

Charles S. Dana chair, endowed in perpetuity

Cathy Basrak Assistant Principal Anne Stoneman chair, endowed in perpetuity

Wesley Collins ° Lois and Harlan Anderson chair, endowed in perpetuity

Rebecca Gitter
Michael Zaretsky \*

Mark Ludwig °

Rachel Fagerburg \*

Daniel Getz\*

Rebekah Edewards \*

Danny Kim \*

Leah Ferguson \*

**CELLOS** 

(position vacant) Principal Philip R. Allen chair, endowed in perpetuity

Sato Knudsen § Acting Principal Mischa Nieland chair, endowed in perpetuity Mihail Jojatu

Sandra and David Bakalar chair

Martha Babcock

Vernon and Marion Alden chair, endowed in perpetuity

Owen Young \*

John F. Cogan, Jr., and Mary L. Cornille chair, endowed in perpetuity

Mickey Katz\*

Stephen and Dorothy Weber chair, endowed in perpetuity

Alexandre Lecarme \*
Nancy and Richard Lubin chair

Adam Esbensen \*

Richard C. and Ellen E. Paine chair, endowed in perpetuity

Blaise Déjardin \*

Oliver Aldort \*

**BASSES** 

Edwin Barker Principal

Harold D. Hodgkinson chair, endowed in perpetuity

Lawrence Wolfe Assistant Principal Maria Nistazos Stata chair, endowed in perpetuity

Benjamin Levy Leith Family chair, endowed in perpetuity

Dennis Roy Joseph Hearne

James Orleans \*

Todd Seeber \*
Eleanor L. and Levin H. Campbell chair,
endowed in perpetuity

John Stovall \*

Thomas Van Dyck \*

#### New Orchestra Members in 2016-17



Bracha Malkin, violin



Rebekah Edewards, viola



Danny Kim, viola



Leah Ferguson, viola

#### **FLUTES**

Elizabeth Rowe Principal Walter Piston chair,

endowed in perpetuity

Clint Foreman

Myra and Robert Kraft chair, endowed in perpetuity

Elizabeth Ostling Associate Principal Marian Gray Lewis chair, endowed in perpetuity

#### **PICCOLO**

**Cynthia Meyers** Evelyn and C. Charles Marran chair, endowed in perpetuity

#### **OBOES**

John Ferrillo Principal Mildred B. Remis chair, endowed in perpetuity

Mark McEwen
James and Tina Collias chair

Keisuke Wakao Assistant Principal Farla and Harvey Chet Krentzman chair, endowed in perpetuity

#### **ENGLISH HORN**

Robert Sheena Beranek chair, endowed in perpetuity

#### **CLARINETS**

William R. Hudgins Principal Ann S.M. Banks chair, endowed in perpetuity

Michael Wayne

Thomas Martin Associate Principal & E-flat clarinet Stanton W. and Elisabeth K. Davis chair, endowed in perpetuity

#### **BASS CLARINET**

**Craig Nordstrom** 

#### **BASSOONS**

Richard Svoboda Principal Edward A. Taft chair, endowed in perpetuity

Suzanne Nelsen John D. and Vera M. MacDonald chair

Richard Ranti Associate Principal Diana Osgood Tottenham/ Hamilton Osgood chair, endowed in perpetuity

#### CONTRABASSOON

Gregg Henegar Helen Rand Thayer chair

#### **HORNS**

James Sommerville Principal Helen Sagoff Slosberg/ Edna S. Kalman chair, endowed in perpetuity

Richard Sebring Associate Principal Margaret Andersen Congleton chair, endowed in perpetuity

Rachel Childers John P. II and Nancy S. Eustis chair, endowed in perpetuity

Michael Winter Elizabeth B. Storer chair, endowed in perpetuity

Jason Snider

Jonathan Menkis Jean-Noël and Mona N. Tariot chair

#### **TRUMPETS**

Thomas Rolfs Principal

Roger Louis Voisin chair, endowed in perpetuity

Benjamin Wright

Thomas Siders Associate Principal Trumpet Kathryn H. and Edward M. Lupean chair

Michael Martin Ford H. Cooper chair, endowed in perpetuity

#### **TROMBONES**

Toby Oft Principal J.P. and Mary B. Barger chair, endowed in perpetuity

Stephen Lange

#### **BASS TROMBONE**

James Markey John Moors Cabot chair, endowed in perpetuity

#### TUBA

Mike Roylance Principal Margaret and William C. Rousseau chair, endowed in perpetuity

#### **TIMPANI**

Timothy Genis Sylvia Shippen Wells chair, endowed in perpetuity

#### **PERCUSSION**

J. William Hudgins Peter and Anne Brooke chair, endowed in perpetuity

Daniel Bauch Assistant Timpanist Mr. and Mrs. Edward H. Linde chair

**Kyle Brightwell**Peter Andrew Lurie chair, endowed in perpetuity

Matthew McKay

#### HARP

Jessica Zhou

Nicholas and Thalia Zervas chair, endowed in perpetuity by Sophia and Bernard Gordon

#### **VOICE AND CHORUS**

James Burton BSO Choral Director and Conductor of the Tanglewood Festival Chorus Alan J. and Suzanne W. Dworsky chair, endowed in perpetuity

John Oliver Tanglewood Festival Chorus Founder and Conductor Laureate

#### **LIBRARIANS**

D. Wilson Ochoa Principal Lia and William Poorvu chair, endowed in perpetuity

Mark Fabulich

#### **ASSISTANT CONDUCTORS**

Moritz Gnann

Ken-David Masur Anna E. Finnerty chair, endowed in perpetuity

ORCHESTRA MANAGER AND DIRECTOR OF ORCHESTRA PERSONNEL

Lynn G. Larsen

ASSISTANT PERSONNEL MANAGERS

Bruce M. Creditor Andrew Tremblay

STAGE MANAGER

John Demick

§ on sabbatical leave

° on leave

#### **In Memoriam**



Jules Eskin, Principal Cello BSO MEMBER 1964–2016

<sup>\*</sup> participating in a system of rotated seating

#### TANGLEWOOD FESTIVAL CHORUS 2016-17

#### JAMES BURTON

**BSO Choral Director and** Conductor of the Tanglewood **Festival Chorus** 

#### JOHN OLIVER ‡

**Tanglewood Festival Chorus** Founder and Conductor Laureate

#### **SOPRANO**

Deborah Abel Natalie Aldrich Carol Amaya **Emily Anderson Kettly Benoit** Debra Benschneider Michele Bergonzi # Aimée Birnbaum Sandra Brayton Foley Joy Emerson Brewer Alison M. Burns Norma Caiazza Jeni Lvnn Cameron Catherine C. Cave # **Stephanie Chambers** Anna S. Choi Lorenzee Cole # Lisa Conant-Nielsen Sarah Dorfman Daniello#

**Bridget Dennis** Emilia DiCola Kaitlin Donovan

Christine Pacheco Duquette \*

Sarah Eastman Jessica Erving Sarah Evans Mary A. V. Feldman \* Margaret Felice Jodie-Marie Fernandes Katherine Barrett Foley Kaila J. Frymire

Diana Gamet Karen Ginsburg **Bonnie Gleason** Jean Grace Christina Grandy de Oliveira

Hannah Grube

Ashley Gryta Beth Grzegorzewski Carrie Louise Hammond Cynde Hartman Alyssa Hensel

Lisa Herrmann Kathy Ho Eileen Huang Stephanie Janes

Polina Dimitrova Kehayova

Ann K. Kilmartin Donna Kim # Shinhee Kim **Greta Koning** Nancy Kurtz # Jane Labriola Amanda Lauricella Barbara Abramoff Levy § Farah Darliette Lewis

Naomi Lopin Osborne Sarah Mayo Deirdre Michael Kieran Murray Kathleen O'Bovle Ebele Okpokwasili-Johnson

Jaylyn Olivo Laurie Stewart Otten Kimberly Pearson Avery Peterman Laura Stanfield Prichard

Livia M. Racz # Stephanie M. Riley Emily Rosenberg Jessica Rucinski Melanie Salisbury # Johanna Schlegel Pamela Schweppe # Sandra J. Shepard Joan P. Sherman § Judy Stafford Stephanie Steele Patricia J. Stewart # Dana R. Sullivan Jessica Taylor Sarah Telford #

Jessica Toupin Nora Anne Watson Alison L. Weaver Sarah Wesley Kirstie Wheeler Lauren Woo

Bethany Worrell Susan Glazer Yospin Wanzhe Zhang Meghan Renee Zuver

Juliana Anderson Virginia Bailey Kristen S. Bell

Martha Reardon Bewick Betty Blanchard Blume #

Betsy Bobo Lauren A. Boice Donna J. Brezinski Janet L. Buecker Janet Casey

Cypriana Slosky Coelho

Sarah Cohan Danielle Coombe Ethel Crawford # Abbe Dalton Clark Kathryn DerMarderosian

Diane Droste # Barbara Durham

Barbara Naidich Ehrmann # Paula Folkman \* Debra Swartz Foote Dorrie Freedman § Amy Spound Friedman Irene Gilbride \* Denise Glennon Mara Goldberg Lianne Goodwin Ana Guigui Julie Hausmann

**Betty Jenkins** Irina Kareva Susan L. Kendall Evelyn Eshleman Kern \* Yoo-Kyung Kim **Eve Kornhauser** Nora Kory Hei Lee Law Annie Lee Gale Tolman Livingston \*

Anne Forsyth Martín Kristen McEntee Louise-Marie Mennier

Ana Morel Louise Morrish Tracy Elissa Nadolny Kendra Nutting Fumiko Ohara Andrea Okerholm Huttlin

Roslyn Pedlar # Laurie R. Pessah Linda Doreen Rapciak Anne K. Smith

Ada Park Snider § Julie Steinhilber \* Celia Tafuri Lelia Tenreyro-Viana Michele C. Truhe Martha F. Vedrine Cindy M. Vredeveld

Christina Wallace Cooper# Marguerite Weidknecht # Karen Thomas Wilcox

#### TENOR

Lucas Alvarado Brad W. Amidon # Armen Babikyan Brent Barbieri James Barnswell John C. Barr # Victor Calcaterra Felix M. Caraballo Ryan Casperson Chad D. Chaffee Jiahao Chen Jiahao Chen Stephen Chrzan **Thomas Corcoran** Andrew Crain #

John Cunningham Sean Dillon Tom Dinger C Paul Dredge Ron Efromson Carey D. Erdman Keith Erskine Len Giambrone James E. Gleason Gregory A. Gonser Leon Grande

J. Stephen Groff \*

David Halloran #

David J. Heid

Brandon L. Hetherington John W. Hickman \* William Hobbib

Stanley G. Hudson \* Timothy O. Jarrett James Ř. Kauffman # Elijah Langille Kwan H. Lee Blake Leister Michael Lemire Michael Levin Lance Levine Justin Lundberg Henry Lussier § **Daniel Mahoney** Ronald J. Martin Mark Mulligan David Norris\* Adam Ouellet John R. Papirio Kevin Parker Dwight E. Porter § Guy F. Pugh Peter Pulsifer Nate Ramsayer Lee Ransom Tom Regan Brian R. Robinson Miguel A. Rodriguez Francis Rogers David Roth Blake Siskavich **Arend Sluis** Peter L. Smith Don P. Sturdy \* Martin S. Thomson Stephen J. Twiraga Adam Van der Sluis Stratton Vitikos **Andrew Wang** Joseph Y. Wang

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Matthew Wang

Hyun Yong Woo

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Michael Cross John Crosslev Arthur M. Dunlap Michel Epsztein William Farrell Jeff Foley Mark Gianino Jim Gordon Jay S. Gregory # Mark L. Haberman \* Jeramie D. Hammond **Geoffrey Herrmann Robert Hicks** Marc J. Kaufman

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Martin Amlin Rehearsal Pianist Ian Watson Rehearsal Pianist Brett Hodgdon Rehearsal Pianist Julia Scott Carey Rehearsal Pianist Jennifer Dilzell Chorus Manaaer Micah Brightwell Assistant Chorus Manager

§ membership of 40+ years

#### ‡ Deceased

#### **BOSTON SYMPHONY ASSOCIATION OF VOLUNTEERS EXECUTIVE COMMITTEE**

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Carolyn Ivory, Usher Liaison, Tanglewood Adele Cukor, Glass House Liaison, Tanglewood

#### **ABOUT THE BOSTON SYMPHONY ASSOCIATION OF VOLUNTEERS**

The BSO has relied on the assistance of volunteers for decades, but in 1984, a group of loyal and dedicated supporters of the BSO and Tanglewood first joined forces to create the BSAV to ensure that all aspects of the BSO's many educational, service, and fundraising initiatives were top-notch.

Members of the BSAV are instrumental in helping the BSO carry out its musical mission. They diligently dedicate hours upon hours to the behind-the-scenes elements for marquee events such as A Company Christmas at Pops, Presidents at Pops, and Opening Nights, to name just a few. BSAV members also play a vital role in many BSO initiatives and programs, such as the Instrument Playgrounds, flower decorating, exhibit docents, and the BSO membership table—among others.

During the 2016–17 season, some 750 volunteers donated nearly 26,000 hours of their time in passionate support of the BSO. For more than 30 years, the BSAV has been a valued partner in helping the BSO maintain its legacy of musical excellence and sustain its community and educational engagement programs to spread the joy of music far and wide.

membership of 35-39 years

<sup>#</sup> membership of 25-34 years

#### THE BOSTON SYMPHONY ORCHESTRA, INC.

Symphony Hall 301 Massachusetts Avenue Boston, MA 02115

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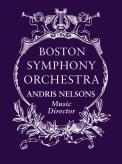
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Richard Subrizio, Director of Development Communications
Kevin Toler, Art Director
Katie Arsenault, Graphic Designer
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For inquiries regarding information contained in this report, please contact Diane Cataudella, Associate Director of Donor Relations, at 617-638-9251 or dcataudella@bso.org.

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MARK VOLPE, EUNICE AND JULIAN COHEN MANAGING DIRECTOR