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2024

ROPA

Regional
Orchestra
Players'
Association

A conference of the American Federation of Musicians, AFL-CIO

Yearly Roundup & New Noteworthy News
by Judy Naillon, ROPA Delegate, VP Local #297,
Editor, The Leading Tone



REGIONAL ORCHESTRA PLAYERS' ASSOCIATION

The Leading Tone

Welcome to a new year and a new look for The Leading Tone as we have transitioned to an all digital format!

Many thanks to our editor emeritus, Sharon Jones for her help making this a smooth transition.

This is traditionally our “yearly round-up” of how some of our fellow orchestras did this past year. Thanks to everyone who submitted a story for this issue! You can submit a story or even bullet points (anytime you have a few minutes) and email them to ropanewslettereditor@gmail.com

Take a look at the highs, lows and creative events that have taken place this year in ROPA and be sure to share this newsletter with your orchestra

members. The new layout is print friendly if you have members who do not have access to electronic means of communication (or if you would like to print one for a bulletin board in your backstage area) and is formatted to a standard size piece of 8.5 x 11 printing paper.

Please feel free to share orchestra news, photos and interesting tidbits about what you’re doing to encourage growth and good labor relations between musicians and management.

In Solidarity,
-Judy Naillon “ViolinJudy”

Judy Naillon

is the ROPA delegate from Wichita Symphony, VP of Local #297 serving much of Kansas and your new *Leading Tone* Editor!



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Notes From The President: A Tale of Three Cities



Some years ago, in 2008, radio station KQED in California broadcast a documentary made by Tal Skloot and Steven Baigel called *The Freeway Philharmonic*. Have you seen it? You should, and you should show it to those uninitiated to our world, to those friends and family that live with us and make heroic efforts at trying to understand the kind of lives we lead as Classical musicians. It's only an hour long, and even though it seems small in the scale of newer, vastly bigger scale projects like *Tár* and *Maestro*, there is something very engaging and, well, human about it. Indeed, there are many more working people now who might relate to the musicians in the film, given the way the so-called gig economy has developed in recent years. I've had a hard time in the past getting people to understand how I could put 353,533 miles on a little gray Prius over the course of six years, but more people get it now for sure.

ROPA comes to the Bay Area this summer for our Conference celebrating the 40th anniversary of our founding. I couldn't resist looking at this film once again, and wondering how the people featured in it are doing now. What happened to them? Are they well, are they still living this life, even after Covid? I'll try to find out. In the meantime, I often think that Skloot and Baigel could have made similar films centered around several regions in the United States. Certainly you could do it in Chicago, or New York, certainly Boston, where I grew up; or Florida, or Texas. Any number of regions that are cultural hubs would have quite a population of accomplished professionals running around trying to make a living. At one point when I was a grad student at NEC, for instance, I was juggling six community orchestras as a ringer and freelancing in theaters as best I could. My old roommate used to laugh at me, saying I'd drive hundreds of miles to blow my nose for who knows how little money. I couldn't get mad, since it was true.

I live in Connecticut and work in the Hartford Symphony along with a large number of professionals who mix and match work in three cities on Route 91 - Hartford, New Haven and Springfield, MA. It has been a very nery few years for all three of these cities and their orchestras, all in ROPA, by the way. Interstate 91 is about the last thing these groups have in common, besides a fair number of professionals who work as much as they can in any or all of these groups.

I joined the Hartford Symphony in 1996. At the time, the orchestra had 11,000 subscribers, an astonishing number even then. Our contract included the Connecticut Opera as well; a ballet company had unfortunately folded by then. When I started, my guarantee as a core orchestra player was 195 services.

Notes from the President (continued)

The orchestra worked really hard. I'm sure you can see how exhausting a schedule like that could be, given that we were always a per-service group. Most musicians lived close to Hartford, and had a lot of connections to the community in one way or another, many working an additional full time job during the day. Consequently, the orchestra schedule happened almost all at night, with carefully chosen exceptions. This remains true, even though our demographic is changing. Long-postponed auditions are happening; more and more players live elsewhere; more and more players are juggling multiple schedules while most locally oriented players are getting close to retirement. The financial disaster in 2008 was a serious threat to our survival, and the trend towards walk up sales hurt as well. Our board entered into a contract with the Bushnell Center for the Performing Arts to combine back office functions, with troubling results. We took a big pay cut in 2015, and we have been struggling to hold the line on the integrity of our orchestra ever since. We were furloughed during Covid, and we suspended a negotiation back then for the sake of emergency measures. When we started negotiating our current CBA, it was April 2022. It took us almost 17 months to ratify something acceptable. Here is my message: we got help. In retrospect it's plausible that three managements were working behind the scenes to exhaust our resources - the Hartford Symphony, New Haven Symphony, and Goodspeed Opera all negotiate with AFM Local 400. Plus, like in many ROPA orchestras, a small number of dedicated musicians tend to take on too much. We enlisted aid from the Federal Mediation and Conciliation Service (FMCS), as well as the AFM's Symphonic Services Division. If you were at the ROPA conference in Atlanta last summer you met the people: FMCS Mediator Dan Ross, and SSD negotiator Todd Jelen. Negotiations were hard, but we got there. We were trying to make up ground on a net inflation rate of about 22% in the time our wages had been flat; we were working to preserve the structure of our guarantee; and we were trying to negotiate a fellowship program into existence. The help we got from our union and the resources we knew about made all the difference. Why do you pay dues to the AFM? These reasons are among the many.

The New Haven Symphony Orchestra is also represented by AFM Local 400. It continues to amaze me that one of the oldest, most storied orchestras in the United States has such a pathetically small guarantee, even as the Orchestra receives occasional large gifts, the latest being \$14 million. In the past, the NHSO had off and on associations with Yale, and 2024 marks its 120th year. Many of the musicians in New Haven play in Hartford as well - the two cities are 39 miles apart. Local 400 has enlisted help from the FMCS in New Haven as well in negotiations that are happening now.

Perhaps the most dramatic story is that of the Springfield Symphony Orchestra, one of ROPA's newest members. Massachusetts is home to a number of cultural hubs. Boston is the obvious one of course; and the Berkshires are host to some of our Nation's most important institutions in music, dance, and

(see next page)

Notes From the President (continued)

theater, Tanglewood being the largest. And, for many decades past, Springfield has been home to an outstanding regional orchestra performing in a marvelous concert hall. When I was growing up in the 70s and 80s, many terrific free lance players from Boston and New York played there alongside a number of Hartford people. They were led by Kevin Rhodes most recently - his other post was at the Vienna State Opera. I say they were led because the board of the orchestra elected to not renew his contract. Rhodes had refused to be used as a weapon against the players who were in the middle of a long and protracted labor dispute, so he was essentially let go. The musicians were naturally outraged. They have been working hard ever since to garner public support and make their case. During the 2021-2022 season, the board refused to program any concerts unless the musicians accepted an outrageously destructive contract which would have gutted an already small season. In response to the board's subsequent refusal to mount concerts in the 21-22 season, the musicians successfully filed a complaint with the NLRB and the SSO was forced to pay the musicians almost \$300,000 for the lost work. The musicians offered to forfeit this payout if the board would resign. The board felt that it was a good use of the orchestra's limited financial resources to pay the \$300,000 for the musicians to NOT play concerts so that they, the board, could stay in power. The musicians had a choice. They could either take the money and sit at home not playing, or present their own concerts. They opted to present concerts. They formed MOSSO, Musicians of the Springfield Symphony Orchestra, and have been presenting their own concerts all over the region. I have attended wind quintet and chamber music events in support - Springfield is only 26 miles from Hartford. Between October of 2021 and July of 2022 MOSSO produced 4 full symphonic concerts in Springfield's Symphony Hall. In the spring of 2023, a two year contract was finally reached. MOSSO agreed to change its name to the Springfield Chamber Players and to promise that as long as the SSO produces a minimum number of classical symphonic concerts each season, MOSSO will only produce chamber music concerts. MOSSO now has a 4 concert series in Westfield, currently in its third year, and a three concert series in Longmeadow, MA. Their first educational concerts will be happening in January and February.

It has been quite a stretch of time for the musicians in our New England Freeway Phil. The criminal behavior of the finance industry in 2008 was tough on everyone in the U.S.; Covid was another body blow. But, what does it say to you that, despite these things, we're still standing, still playing great music for audiences that still want it, now more than ever? What does it say that more younger players are seeing our successes and our solidarity and are getting involved? I well know what it feels like to go up against a bunch of accountants and lawyers representing my friends and colleagues - it's a lot of pressure. ROPA, along with your AFM, SSD, as well as FMCS and other resources are here to help. You are not alone on that freeway!

UPDATE: The musicians of the New Haven Symphony voted to authorize a strike in late December 2023. At the moment, they are waiting to discuss an offer and take a vote, while working the services currently scheduled. Several actions are possible depending on how things go, including a strike.

-Steve Wade, President, Regional Orchestra Players' Association

The Leading Tone

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- To subscribe to the ROPA Internet Mailing List, visit <http://groups.google.com/group/ropa-discussion>.
- The list is open to musicians in ROPA member orchestras, and AFM Local officers

Yearly Roundup & New Noteworthy News

The Pasadena Symphony and Pops Board of Directors has appointed Andrew Brown as the new CEO. Mr. Brown will be managing the Pasadena Symphony, the Pasadena Pops under the direction of Michael Feinstein, and the Pasadena Youth Symphony Orchestras. Bringing more than 20 years of experience in arts management, we look forward to the PSO's 96th season with Mr. Brown at the helm. As Chief Operating Officer, Mr. Brown facilitated the transition of the Los Angeles Master Chorale to a fully professional chorale and tenured orchestra, and more recently, comes to the PSO from over 5 years of serving as CEO of the Pacific Chorale, during which time the organization won it's first Grammy, as well as seeing significant growth. The Board of Directors is also excited to announce the election of Kimberly Winick as President of the Board of Directors. Ms. Winick has served on the Executive Board of the PSO for over a decade in various capacities, including Director-At-Large, Co-Chair of the CEO Search Committee, and Vice President of Investments. The Pasadena Symphony is currently engaged in a Music Director search, and orchestra personnel are pleased to welcome Andrew Brown to pilot the orchestra through this time of change and growth.

-Lynn Grants, section Viola and ROPA Delegate, Pasadena Symphony and Pops

NMPhil: Our contract expired 08/31/2022 and we've been negotiating since then, and we have had no raise since 2021. The musicians filed several ULP charges in 2021, which the NLRB found to have merit. Because of a backlog in their caseload the NLRB could not bring the case to trial then. We filed more ULP charges last season, and the NLRB combined these with the case from 2021. Trial was set for May 31, 2023. We were ready to testify when the NMPhil's lawyer signed a settlement on May 27, 2023. The salaries of upper management have increased tremendously while musicians' per service pay has barely moved over the years. Our last contract, 2017- 2022, was a concessionary contract. The NMPhil Board President for life told us if we helped them get through a rough period by making concessions, they would make it up to us in the next contract.

-Frank Murry, delegate NMPhil in Albuquerque.

West Virginia Symphony Orchestra

With our new Music Director now selected, the WWSO is definitely returning to a more normal schedule. Maurice Cohn is young, ambitious, and eager to get this orchestra back on to playing and bringing music to the state.

We recently played a series of concerts to 8th graders in Charleston, Parkersburg, and Clarksburg WV. We performed our annual Christmas program in Lewisburg, Charleston, and Parkersburg. Parkersburg has its own board and chooses the concerts it wishes to sponsor in their own city.

We also performed with the Nutcracker with the Charleston Ballet, an event that always sells out and the Symphony String School Program had ensembles in the lobby entertaining prior to those shows.

Before Christmas, we also performed Messiah with the Symphony Chorus.

In December I was part of an audition committee that was cloistered for 12 hrs. listening to auditions for CM, asst. CM, Principal Second and assistant Pr. Second, as well as for other positions that have become vacated during the Pandemic. We've been hiring numerous subs, and now can get back to something resembling normal. 36 people applied to audition for these open violin seats, and the type of vacancies required several rounds.

Our audition process required that the committee arrive well ahead of candidates. We were seated in our large auditorium, and when candidates arrived they were taken to warm-up rooms, and directed to the stage when it was time for them to perform. There was a huge screen across the stage so none of us could observe each other. The committee put in lunch orders first and these orders were delivered at noon. For dinner mgt. provided pizza and drinks. The audition committee is also paid hourly for this and we didn't conclude until around 10 p.m., with full knowledge that we might be there til midnight.

Each of us are elected to be on these committees. The string audition committee includes all principal string players and a group elected by the orchestra members. We sat alone in our large hall along with our new MD. He pre-selected a large list of violin excerpts, and we chose the excerpts to be played for each round collectively. We did not discuss candidates but took notes and rated each performer. At the end of the day we asked to know who won the top seats and learned some were already members who will move up, and others will be new to the orchestra.

It was a good day and I feel honored to have been on that audition committee.

-Karen Barker Ferren

This past October, the Wisconsin Chamber Orchestra embarked on the first year of a five year recording project titled "Musical Landscapes in Color". Named after the book by our composer in residence, Dr. William Banfield, the goal of this project is to record 5 full albums featuring the music of living BiPoc composers (both those highlighted in his book, and those who have come into the field more recently) who have not had much time or attention given to their works in the orchestral field. Our first album will be released this March and will feature the music of both Dr. William Banfield and Patrice Rushen.

-Brandon LePage

Following negotiations that spanned many months, Dayton Philharmonic musicians recently ratified a two-year agreement with our employer, the Dayton Performing Arts Alliance. We achieved a 5% pay raise in year one, and 4% in year two; in addition, mileage and longevity pay were both increased. Service guarantees for orchestral services will hold at the 22-23 rate in year one, which was 75% of the pre-pandemic level. In year two, every contract level will get a 10-service increase. Service guarantees for small ensembles were raised, returning those to pre-Covid levels in year two.

Our overtime language was greatly simplified and streamlined. While film and opera performances will not accrue overtime payments until the three hour mark, all overtime that is paid will be paid at the same rate, regardless of the type of performance. (Opera overtime previously was paid at a lower rate than other services.) The maximum number of services per week was raised from seven to eight, but limitations were put in place concerning overtime during those weeks, as well as a limit of two consecutive eight-service weeks. The minimum service attendance requirement, which had been suspended during the pandemic, was restored to a 50% minimum during year one, and 60% in year two, bringing us back to pre-Covid levels but without the higher requirement for principals that was previously in place. In addition to the CBA, we are also agreeing in a side letter that one vacant chair in each string section may remain unfilled for the duration of the contract.

Some other highlights of the new contract include the following: We achieved representation on the programming advisory committee as well as the president/CEO search committee. We added the requirement that management respond to ROPA Wage Chart information requests in a timely manner. We updated our dress code to be more gender-neutral, updated our nondiscrimination language, and added policies to make auditions more fair and accessible. We also clarified processes for providing feedback to probationary musicians and for granting tenure.

Although small, we are optimistic about the increase in service counts, and are hopeful that the DPAA's heavy recent investment in marketing and development will result in further movement in that direction.

-Sheridan Currie

Principal Viola, Dayton Philharmonic

Do you have news about your orchestra? An article to submit? A letter to the editor? We'd love to have you contribute to *The Leading Tone*! Submit articles to Judy Naillon at ropanewslettereditor@gmail.com

The Leading Tone is the official voice of ROPA and reflects ROPA policy. However, we do appreciate and encourage the the contributions of articles and letters by others. These submissions may cover topics on which ROPA has no official position; the opinions expressed therein are solely those of the author(s) and not necessarily of ROPA, it's officers or members.

The Orlando Philharmonic Orchestra announces the appointment of **Karina Bharne** as Executive Director.



The Orlando Philharmonic Orchestra announces the appointment of Karina Bharne as Executive Director.

Karina joins the Orlando Philharmonic Orchestra team after serving as the Executive Director of Symphony Tacoma in Tacoma, Washington since 2018. A seasoned orchestra executive with over 15 years of experience, she also worked with the San Antonio Symphony as Interim Executive Director and with other positions in Operations and Orchestra Personnel. Bharne received a Masters of Business Administration from Eastern Washington University, a Master of Arts Management from Carnegie Mellon University, and a Bachelor of Fine Arts from Carnegie Mellon University. She is well-versed in cultivating board leadership, garnering philanthropic support, and supporting a vibrant administrative team. She is also a cohort member of the League of American Orchestras Emerging Leaders program and Symphony Tacoma was recently awarded and received the competitive Catalyst Incubator Fund grant to further the work of diversity, equity, inclusion, access, and belonging as part of their work in the South Sound community. Bharne and her family will relocate to Florida in the coming months. A search committee was formed by the Board of Directors in June, following the announcement of the departure of Paul Helfrich. The committee worked to identify candidates and hire the full-time Executive Director. Paul Helfrich departed Orlando in mid-September after announcing he would join his family in North Carolina.

“We went through a comprehensive search process. Received applications from around the country and interviewed several qualified candidates. I would like to thank everyone on the search committee for the time you invested to help us find our new Executive Director. I am very excited to collaborate with Karina and see her take our orchestra to the next level,” said Priscilla Azzolini, Vice President of the Board of Directors and Chair of the Search Committee.

The Orlando Philharmonic Orchestra serves as Central Florida’s only professional orchestra and has seen tremendous artistic and community growth under Music Director Eric Jacobsen. The Philharmonic is currently in its 31st Season, a resident organization at Steinmetz Hall at the Dr. Phillips Center, and performs over 150 concerts annually throughout Central Florida. The Board of Directors, Musicians, Staff, and Volunteers continue to focus on creating growth and innovation through music and engaging our Central Florida community with the excellence of the Orlando Philharmonic Orchestra.

The mission of the Orlando Philharmonic Orchestra is to provide excellence and innovation in orchestral performance and education that serve and engages the community.

-Kathy Thomas

Wichita Symphony to hire a new CEO

Current WSO CEO, Don Reinhold, announced his retirement in 2024 and will leave within a year. A search has commenced and the Orchestra Committee has asked that our CBA be re-opened to include two musicians of our own choosing (currently the board of directors selects the musician) to be included with voting privileges on the search committee. We look forward to a collaboration and anticipate the board agreeing to this small but meaningful ask.

_Judy Naillon

Making Connections: Nurturing Community in Orchestras

The story originated from me, at the conference a few years ago, about my colleagues in orchestra coaching me through menopause. It can be as simple as that, something we have in common, that others have gone through and can share the benefit of their experience; or other interests we have where we could pool our knowledge and learn. Making any connections adds to our knowing each other, to camaraderie and solidarity, as well as spreading the helpful information.

Someone looking for housing can connect with people looking for a housemate; someone looking for a van (percussionist of course) with someone wanting to sell one. People with skills or knowledge can connect with people who need the help or want to learn. Plus once in a while we can do silly things, like all wear tie dye on the same day.

Politics can be bonding too, though you may not think so immediately. In San Jose, when one of our violists went to Washington, D.C. for the Women's March, another violist made "Pink Pussy" hats for the whole viola section, which they wore for a photo I took and sent to her, saying we missed her but supported her.

We gardeners often bring in produce when fruit is ripe, for instance, in an orchestral "crop swap", of lemons, limes, oranges; apples, plums, apricots, peaches; or veggies when all of someone's tomatoes get ripe at the same time. A bassoonist gave me a tomato starter plant, a "Paul Robeson"; I gave a violist a grapevine I rooted from mine; and I got advice on gopher "control" techniques from 2 violinists and a bassoonist.

A flutist had given me seeds to a bean variety that had been in her family for generations, that her father brought here in his pocket as he came through Ellis Island. I shared the seeds with friends as I saved them, each year, but when gophers threatened my crop, I got scared the variety could be lost, so I contacted the Seed Savers Exchange (devoted to preserving biodiversity), and after they verified the provenance, a horn player helped me provide 100 seeds, now officially the Tamburrino Family Heirloom bean seeds, due to our group effort.

Years ago, a violinist organized a class on composting, given by a horn player who was a Master Composter; I got started composting because of that. We also took a pruning class together.

Many musicians enjoy biking or hiking, and other sports (participant or spectator) and share—our trumpet player posts selfies with his bike, on Instagram, from some awe-inspiring pinnacle or rocky trail. Others run marathons or popular runs like the traditional Bay to Breakers, across San Francisco.

When on tour, I've done Tai Chi with other musicians during the breaks; and I know others who do yoga or different kinds of body movement/massage/relaxation techniques/exercise regimes. I get orthobionomy sessions from a horn player. Often of interest to musicians for obvious reasons, sharing of this kind particularly engenders community and caring, just in helping people feel good!

Carmel, where Monterey Symphony performs, became an outstandingly pet friendly area under Doris Day's influence, so now some restaurants feature a dog menu, for outdoor patrons; and since our orchestras' musicians predominantly commute from other areas, many bring their dogs. Sometimes a half dozen canines and their humans, are playing "keep away" on the lower parking lot. Occasionally a pet will come back stage but we understand and generally try to let the dog owners take the shady parking spots.

A number of musicians do animal volunteer work: I know two violinists and the wife of a percussionist, who find homes for cats; and a horn player who raises puppies to be companion, service, or medical assistance dogs. Besides dogs and cats, some of our musicians have birds, so they exchange care and feeding and vet information.

I volunteer for the Oakland Museum White Elephant Sale, working on the Special Occasions rack in the Women's Wear Department, so if there are concert-suitable garments left over at the end (of our annual cycle) when they are deeply discounted, I buy them up, bring them to symphony sets I play, and sell them to my colleagues at the low prices—so there's a whole group of us Thrift Store enthusiasts who have bonded around this (not just women either—a horn player bought his daughter a great black leather coat) and in Monterey, the staff participate too.

Jokes: the one day San Jose Symphony went on strike, we were walking around holding picket signs and when we passed each other we'd tell jokes. You know the violin etude book called Dont? Well, for viola it's Cant, for cello it's Wont and for bass it's Shouldn't. How about the Tune a Day book? For viola it's Tune a Week; for cello it's Tune a Month; for bass it's just Tune. (With all due respect to bassists; it was a bass player telling these jokes). The stage manager in Monterey used to trade jokes with me, but some of his were over my head.

Some musicians play other genres of music,—mariachi, jazz, country, salsa, bluegrass, hip hop, rock or jug band,—and can feel isolated in an orchestra of classical musicians. It can make all the difference to their feeling included, to know the others who play some kind of “popular” music.

A handful of musicians are into motorcycles; I am not so I cannot empathize, but I know people who can carry on long conversations about cars (vintage or otherwise), motorcycles, motors, engines, —or airplanes; a bassoonist used to fly a small plane from San Jose to Monterey for the symphony sets.

Another group I’m not in, is where they bond by talking about sports, the teams, the players and coaches, as well as the games. I do know at least a few musicians who fantasize they play professional sports; and many others who enjoy the discussions and spectating, but though I joined those “taking a knee” for the Star Spangled Banner, when I first heard about it I had to ask what “taking a knee” meant.

Informal book clubs: rising out of conversations and the discovery of books we each owned, a half dozen of us are passing around a collection of books and DVDs about the Japanese-American Internment during World War II; which eventually will go to a violinist’s niece who is a teacher and will use them in her class.

A bookcase in San Jose’s Musicians’ Lounge serves as a mini-library, we readers and collectors of books having donated the reading material; we love getting and giving recommendations and can talk books the way some talk sports. Don’t ask me what I’m reading unless you really want to know!

Many musicians practice other crafts (besides music): knitting/crochet, sewing, quilting, woodworking, mosaic, jewelry, or candle making...We used to have a table in the green room for Nutcracker, where musicians displayed their wares and we could buy. Two musicians created a quilt (with appropriate design) to present to the CEO upon his retirement (the orchestra donated funds for the materials).

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Food and nutrition in themselves naturally bring people together in different ways: I know a violinist who graduated from Paris' Cordon Bleu cooking school; and some who are diabetic, have allergies or need gluten-free diets, so have learned a great deal about nutrition in researching their conditions; and everybody has to eat, so we trade food and seeds and recipes. An oboe player who was a member of the mycological society, invented recipes with exotic mushrooms. During the shelter in place, a half dozen friends sent me email chain letters for recipes (yes, I did them all, thinking I'd get a whole mess of recipes but though I did get some, too many people broke the chain, as is usual).

Finally, in Local 6 we have an annual picnic and barbecue, reserving a park with barbecue pit; providing burgers (veggie option included) and the fixings (lettuce, onions, tomato, mayo, catsup, relish...); honey lemonade and iced tea; and beer (several musicians make beer or wine; and a trumpeter worked for Anchor Steam, so could get beer donated; but otherwise, we spring for a keg or two). We have a pot luck table so musicians bring other drinks, salads, chips/dips, and desserts; some bought and some home made. Lasting several hours so some musicians can come before or after a gig, we schmooze and meet each other's kids, grandparents, or significant others.

When does it happen? Labor Day, of course.

-Allison Dang, Violin, Monterey Symphony



Monterey Symphony Musicians, Allison Dang

Rick's Tax Tips

by Rick Basehore, ROPA Treasurer and Annapolis Symphony Delegate

Hello Everyone, with 2024 well on it's way it's time to begin working on your 2023 taxes. Here are some tips to make your life easier during the 2024 filing season.

1) Begin logging your expenses now! Ideally, you have been tracking your business expenses all year. But for those who need to begin this task, open up a spreadsheet or your favorite word processing document and start listing all your expenses. Ideally you would group these by expense category; but even if you don't, make sure each entry has the date, type, amount of, and (if it's not obvious) the reason for the expense. The reason why this should be your first task is because you cannot accurately calculate your income without knowing your Net Business Income, which you cannot calculate without knowing your business expenses.

2) PRORATE! For those who were at the ROPA Conference this past summer, you heard my presentation about prorating your musician expenses between your self-employment and employee income activities. Here's the short version: those expenses attributable to your income from self-employment as a musician will go on your Schedule C, while those expenses attributable to your income as an employee are non-deductible under current tax law. If you are confused about what this means or how to do it, ask a tax preparer with experience filing musicians' taxes. You may also refer to the ROPA website to see the materials presented at the 2023 conference. The link is:
<http://ropaweb.org/support/2023-annual-conference/2023-conference-schedule-and-documents/>

3) If you use a tax preparer, let him or her know about any major life changes. A new dependent is often a child, but could also be your parent that moves in with you. A new house, whether it is your new home or an investment property will affect your taxes. You may have begun collecting social security or taking distributions from retirement accounts, both of which will affect your taxes. Going through a divorce? Yes, it sucks, but let your tax preparer know as its circumstances could seriously affect the amount of tax due. In short, don't be shy with your tax preparer -- their job is to help you pay the correct amount of tax.

4) **Schedule your appointment with your tax preparer for late February.** Musician taxes are usually complicated, so don't wait until the last week of March to visit with your tax preparer. Often your tax preparer may request further information from you and you don't want to be rushing around at the last minute searching for it. Don't schedule the appointment before mid-February *unless* you are absolutely certain you will have received all your forms W-2, 1099, and other informational IRS forms.

5) Be at least a little organized! Whether you use folders, envelopes, or scan everything into the computer, keep all your tax materials in the same place. When you begin working on your taxes, you want everything to be together, even if it's not fastidiously ordered. Have that place on a bookshelf, on your desk, or in a file cabinet that is "that place" you would put something tax-related. It will make your life simpler, I promise!

6) The IRS has never been very technologically advanced, but it has more and more tools available on its website these days. There are calculators for estimated tax payments, W-4 withholding amounts, penalties & interest, required minimum distributions, etc. There is also a tool for finding the status of your refund, once your return has been filed. Wait about 3 weeks after you've e-filed (more like 2 months if paper filing) and search for "Where's my IRS refund?" It should be at the top of the search results.

Important 2024 Tax Dates

January 16: Deadline to pay your Q4 2023 IRS estimated tax payment (and most states - but check yours to be sure!)

January 31: If your business (this includes self-employed musicians!) paid a non-corporate entity (e.g., an individual or an LLC that is not an S-Corp.) more than \$600 within calendar-year 2023 for any reason, you must give that entity a 1099-NEC. You have until February 28 to file that 1099-NEC with the IRS.

March 15: 2023 Filing deadline for Partnerships and S-Corps (forms 1065 and 1120-S, respectively)

April 15: 2023 Filing deadline for most individuals. You may request an extension, but remember: any tax due for tax-year 2023 not paid by April 15 will still accrue interest. The extension is for filing, not paying any tax due! Be sure to file form 4868 or use the IRS website by April 15 to file for the extension.

April 15: Deadline to pay your Q1 2024 IRS estimated tax payment (and most states - but check yours to be sure!)

October 15: 2023 Filing deadline for those individuals who filed for an extension.

Meet Your ROPA 2024 Members- At -Large



Beverly Setzer
Symphony Tacoma
MAL



Marjorie Goldberg
Delegate, Harrisburg Symphony
MAL



Richard Kelly
Portland Symphony
MAL



Brooke Beazley
Delegate, Opera Philadelphia
MAL



Lisa Davis
Delegate, Mississippi Symphony
MAL



Sheridan Currie
Delegate, Dayton Philharmonic
MAL



Bandon LePage
Delegate, Wisconsin Chamber Orchestra
Flint Symphony Orchestra
MAL



Ann Rule
Delegate, Colorado Springs
Philharmonic Orchestra
MAL



Alana Wiesing
Delegate-At-Large to the AFM Convention,
Tucson Symphony Orchestra

Leonard Byrne

passed away in January 2024. Many of you will remember him as ROPA's first treasurer. More information and an article on Leonard will appear in the next issue of *The Leading Tone*

ROPA 2024 - 40 Years Stronger Together

AFM Symphonic Services

Division Negotiation

Workshop: Monday, July 29

Conference General Session: Tuesday, July 30 to Thursday, August 1

Parc 55

55 Cyril Magnin Street
San Francisco, CA 94102

Reserve your room at the hotel at the conference rate of \$189 per night, a great deal for downtown San Francisco. The deadline to get this rate is

July 5:

<https://book.passkey.com/go/ROPA2024>

HOTEL





NEW TO ROPA?



-Book your flight ASAP

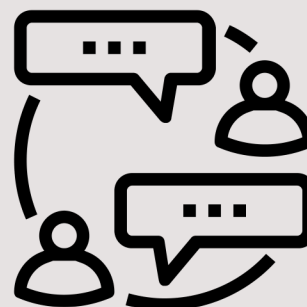
-Book your hotel using the link for the block rate.

-If you're negotiating next year, plan to attend the AFM Symphonic Services Division Negotiation Workshop on Monday. This workshop is always the day before the conference begins and the AFM will provide payment for the extra night of hotel stay and extra day of per diem.

DELEGATES:

Don't forget to share this newsletter with your orchestra members.

Thank You!



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DELEGATES:

**Make sure you can
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resource with your
members!**

ROPA Member Orchestras

Full Members

Annapolis symphony
 Ann Arbor Symphony
 Arizona Opera Orchestra
 Atlanta Ballet Orchestra
 Atlanta Opera Orchestra
 Austin Symphony Orchestra
 Ballet West Orchestra
 Binghamton Philharmonic
 Boise Philharmonic
 Boston Ballet Orchestra
 Boulder Philharmonic
 California Symphony Orchestra
 Canton Symphony Orchestra
 Cape Symphony
 Central City Opera Orchestra
 Chattanooga Symphony &
 Opera Orchestra
 Chicago Sinfonietta
 Colorado Springs Philharmonic Orchestra
 Dallas Opera Orchestra
 Dayton Philharmonic
 Delaware Symphony Orchestra

Detroit Opera Orchestra
 Duluth Superior Symphony Orchestra
 East Texas Symphony Orchestra
 Elgin Symphony Orchestra
 Erie Philharmonic Orchestra
 Eugene Symphony
 Fort Wayne Philharmonic
 Fresno Philharmonic Orchestra
 Harrisburg Symphony Orchestra
 Hartford Symphony Orchestra
 Houston Ballet Orchestra
 Houston Grand Opera Orchestra
 Huntsville Symphony Orchestra
 Illinois Philharmonic Orchestra
 Kalamazoo Symphony Orchestra
 Knoxville Symphony Orchestra
 Lansing Symphony Orchestra
 Las Vegas Philharmonic
 Lexington Philharmonic
 Long Beach Symphony Orchestra
 Los Angeles Opera Orchestra
 Madison Symphony Orchestra
 Marin Symphony
 Memphis Symphony Orchestra
 Minnesota Opera Orchestra
 Mississippi Symphony Orchestra

Monterey Symphony
 National Philharmonic Orchestra
 New Haven Symphony Orchestra
 New Mexico Philharmonic
 New West Symphony Orchestra
 Oakland Symphony
 Omaha Symphony Orchestra
 Opera Philadelphia
 Orchestra Iowa
 Oregon Ballet Theatre Orchestra
 Orlando Philharmonic Orchestra
 Palm Beach Opera Orchestra
 Pasadena Symphony Orchestra
 Philadelphia Ballet Orchestra
 Pittsburgh Opera Orchestra
 Portland Opera Orchestra
 Portland Symphony Orchestra
 Reading Symphony Orchestra
 Rhode Island Philharmonic
 Richmond Symphony
 Sacramento Philharmonic & Opera
 Santa Barbara Symphony
 Santa Rosa Symphony
 Sarasota Orchestra
 South Bend Symphony
 Southwest Florida Symphony Orchestra
 Spokane Symphony Orchestra
 Springfield Symphony Orchestra
 Symphony San Jose
 Symphony Tacoma
 Toledo Symphony Orchestra
 Tucson Symphony Orchestra
 Vermont Symphony Orchestra
 West Virginia Symphony
 Wichita Symphony Orchestra
 Wisconsin Chamber Orchestra

Associate Members

Capital Philharmonic of New Jersey
 Eastern Connecticut Symphony Orchestra
 Flint Symphony Orchestra
 Glimmerglass Opera Orchestra
 Lincoln Symphony Orchestra
 Milwaukee Ballet Orchestra
 Opera San Jose
 Pittsburgh Ballet Orchestra
 Southwest Michigan Symphony Orchestra
 Tri-Cities Opera Orchestra
 Tulsa Opera



A conference of the American Federation of Musicians, AFL-CIO

The Leading Tone
 901 C Street
 Lincoln, NE 68502

▶ ROPA 2024 ◀

Conference

40 Years Stronger Together



Parc 55
55 Cyril Magnin Street
San Francisco, CA 94102



NEGOTIATIONS WORKSHOP
July 29th



GENERAL CONFERENCE
July 30th – August 1st



Hotel rates are \$189 per night but
you must book by **JULY 5TH**

<https://book.passkey.com/go/ROPA2024>