



# The Giving Common

An Initiative of the Boston Foundation

[www.thegivingcommon.org](http://www.thegivingcommon.org)

Passim (47 Palmer Inc)



## General Information

26 Church Street, Suite 300  
Cambridge, MA 02138 3708  
(617) 492-5300

**Website**

[www.passim.org](http://www.passim.org)

**Organization Contact**

Dan Hogan [info@passim.org](mailto:info@passim.org)

**Year of Incorporation**

1994

# Statements & Search Criteria

## **Mission Statement**

The mission of Passim is to provide truly exceptional and interactive live musical experiences for both performers and audiences, to nurture artists at all stages of their career, and to build a vibrant music community. We do so through our legendary listening venue, music school, artist grants and outreach programs. As a nonprofit since 1994, Passim carries on the heritage of our predecessors—the historic Club 47 (1958-1968) and for-profit Passim (1969-1994). We cultivate a diverse mix of musical traditions, where the emphasis is on the relationship between performers and audience and between teachers and students. Located in Harvard Square, Passim serves Cambridge and the broader region by featuring local, national and international artists. Our ultimate goal is to help the performance arts flourish and thereby enrich the lives of members of our community.

## **Background Statement**

Established as Club 47 in 1958, incorporated as a nonprofit in 1994, and located in the heart of Harvard Square, Passim has been a cornerstone of the arts community of New England for over half a century. Club Passim is one of the few “listening rooms” in the greater Boston/Cambridge area—a place where audience and artist interact with one another in an intimate setting. Passim presents music with a folk aesthetic, where the emphasis is on the relationship between performers and patrons, teachers and students. Our music covers the spectrum of what sounds great in a small venue – Americana, bluegrass, blues, Celtic, country, folk, jazz, Klezmer, old-time, pop/rock, singer-songwriter, a cappella, and world music, among others. Joan Baez, Bob Dylan, Al Kooper, Tom Rush, Peter Wolf, Patty Larkin, Regina Spektor, Josh Ritter, and Suzanne Vega, to name but a few, started out at our Club before they began playing at larger venues. Many of these would say that our venue was their home in their early days.

The essence of Passim’s mission is to provide inspiring musical experiences for all and to develop artists by providing a close-knit community and musical home base where artists can thrive. Passim does this through our programs, which in 2011 achieved record results in a variety of arenas:

- Club Passim—where emerging artists open for well-known ones, play open mics or perform at campfire. Club Passim held 432 concerts with 32,500 patrons in 2011.
- Passim School of Music—where those taking ensembles, classes, voice lessons or workshops can actually perform on the Club stage and Club artists provide instruction. The School of Music had 723 students attending 79 classes, 89 voice lessons, and 15 workshops in 2011.
- Passim Iguana Music Fund—which gives grants to New England-based artists to help their career or community efforts. In 2011, the Fund gave out \$33,000 in grants ranging from \$500-\$2,000 to twenty select NE-based artists to help develop their careers or assist their community-service efforts.
- Passim BCMFest (Boston’s Celtic Music Fest)—which is considered the premier presenter of Boston-based Irish, Scottish & Cape Breton music. In 2011, Passim completed the merger of BCMFest as a Passim program. In January 2012, BCMFest opened the Harvard Square Business Association’s Winter Carnival with audiences forty percent above the previous year.
- Outreach—in which Passim presents artists in the community. In 2011, Passim Outreach presented 15 free outdoor weekly concerts in Harvard Square as part of the Passim Summer Stage, along with stages for Mayfair and Oktoberfest.

## **Impact Statement**

Past year (2014):

- Club Passim Concerts: For more than 56 years, our Club has provided a nurturing environment for the development of emerging artists. Over the last five years, we have held an average of more than 425 concerts a year with more than 400 artists performing each year for more than 30,000 patrons.
- Passim Iguana Music Fund: This fund provides grants between \$500 and \$2,000 to independent and emerging artists. In 2013 it surpassed the \$200,000 mark in total giving since inception in 2008, giving out a record \$45,000 to 26 artists to fund significant career-building or community service projects.
- School of Music Enrollment: Our School had more than 700 students in 2014 - double the number who attended in 2008. This is a significant achievement, since we are so space-constrained in terms of classrooms. In fact, most of our classrooms serve multiple functions - an office during the day and a classroom in the evening.
- Boston's Celtic Music Festival (BCMFest): In 2011, Passim completed the merger of BCMFest as a Passim program. It is considered the premier presenter of Irish, Scottish & Cape Breton music in the Boston area. In January of each year, BCMFest opens the Harvard Square Business Association's Winter Carnival. It is an all ages festival at multiple venues.
- Financial Strength: In 2014, for the sixth year in a row, we finished with no debt and in the black. In each year, we have significantly increased our cash reserve and our net surplus.

2015 Goals

- Ensure excellence in our core programs, while maintaining a sound balance sheet and finishing the year with a surplus.
- Raise attendance at the Club, while continuing to showcase emerging artists.
- Grow enrollment at the School of Music to 750-800, especially with our Ensemble program
- Increase total grants given out annually by the Iguana Music Fund to \$50,000.

## **Needs Statement**

- Club Renovation: Our historic Club is in need of improvements. Perhaps most pressing is making it handicap accessible. In addition, we want to revamp much of the facility, including the lobby, kitchen, bathrooms, green room, sound booth, box office, stage, air-conditioning, lighting, and sound system. This is critical to our mission of developing artists and creating community through developing inspiring and interactive musical experiences in our Club and School. Since we do not own our building, and since undertaking a renovation will trigger full-building ADA compliance for the common spaces, we must have the cooperation of the owners of the building. We are currently in the process of negotiation.
- New Relational Database: Right now for data entry related to our customers, donors, members, artists and others for purposes of ticketing, course enrollment, and financial record keeping, we frequently have to enter information into multiple databases, including FileMaker Pro, QuickBooks, Constant Contact, ShoWare and Excel spreadsheets. To save time and increase accuracy, we desperately need a relational database where information is only entered once. This will allow us to provide better service and create a better experience for all our constituencies. We are in the final stages of negotiation with a vendor about this.
- Public Awareness: We need to dramatically increase the public's awareness of our nonprofit status, our mission and that we have several programs in addition to our well-known Club Passim.

### **CEO/Executive Director Statement**

The common thread throughout Passim's long history has been the ability of this small club to nurture and develop the artists of the future, while building a tight-knit community of musicians, patrons, instructors and students, to go along with our staff and board.

This thread goes back to 1958, when Club 47, Passim's predecessor, was born at 47 Mt. Auburn Street. In 1963 it moved to 47 Palmer Street. In 1968 the Club closed and became Eugene McCarthy's Presidential campaign headquarters. In 1969 the Club re-opened under the care of Bob and Rae Ann Donlin, beat poets who were friends of Alan Ginsburg and Jack Kerouac. They wanted a coffee shop but artists and former patrons pestered them into bringing back the music. For 25 years Bob and Rae Ann kept the music going and helped the development of many a singer/songwriter. In 1994 they retired and the Club became a nonprofit, which it has been to this day. Under the leadership of Matt Smith, the Club has broadened the scope of our music to include many different genres.

Passim uses a variety of vehicles to fulfill its mission to build community and develop artists, including the following:

- Passim Iguana Music Fund – providing grants to New England-based artists
- Club Passim – giving opportunities to young artists as opening acts and even headlining
- School of Music – giving instruction in voice, instruments, and ensembles through classes, master classes, workshops and individual lessons
- Campfire Festivals – providing four days of nonstop music with over 100 artists during Memorial Day and Labor Day weekends and two days over President's weekend, where emerging talent gets a chance to play and performers learn from each other

### Service Categories

Music

Music

Fund Raising & Fund Distribution

### Geographic Areas Served

Passim is located in Harvard Square, Cambridge (zipcode 02138). We serve New England, Boston, and the vibrant music community of Cambridge and neighboring towns. Some patrons travel to Passim on a regular basis from as far as New Hampshire and Martha's Vineyard. Our December holiday concerts bring in people from Chicago and occasionally California. Passim is located in Harvard Square and provides live music performance and learning programs to regional patrons, though the Club features performers and the School features instructors who are national and international. Through broadcasting most of our performances live on the web, we are able to bring our music to people world-wide.

Please review online profile for full list of selected areas served.

# Programs

## **BCMFest (Boston's Celtic Music Fest)**

### **Description**

BCMFest (Boston's Celtic Music Fest) showcases Greater Boston's best performers of music, song and dance from the Irish, Scottish, Cape Breton and other Celtic traditions. Founded in 2004, BCMFest is celebrating its 10th anniversary at its annual event, January 11-12, 2013. In addition to the annual festival, BCMFest sponsors other events during the year, including a monthly series at Club Passim.

BCMFest's mission is to produce locally-based Irish, Scottish, Cape Breton and other Celtic and Celtic-influenced music and dance in an upbeat and all-ages friendly environment; to bolster appreciation for traditional Celtic music and dance among youth and the greater Boston community; to support a living, changing tradition by encouraging cross-genre collaboration and innovation among dancers and musicians of all generations; and to produce a variety of collaborative projects and performances for, in and of the greater Boston community.

### **Budget**

57000

### **Category**

Arts, Culture & Humanities, General/Other Music Festivals

### **Population Served**

Families, Children and Youth (0 - 19 years), Adults

### **Program Short Term Success**

For the 10th annual festival in January 2013, attendance will increase 40% over last year. Financial support from sponsor and program advertisers will exist for the first time. Performing artists will be compensated with living wages.

### **Program Long term Success**

For artists, to enrich community so that each participant has the ability to collaborate creatively with each other.  
For audience members, continue to entertain and inspire with a variety of performances, and to bolster appreciation for traditional Celtic music and dance among youth of the Boston area.  
For events, each monthly showcase and annual festival filled 100% to capacity with paying audience members, and to operate each event in the black.  
Overall, the Celtic tradition continue to thrive: artists will celebrate and perform Celtic song and dance, and audiences will be engaged participants.

### **Program Success Monitored By**

Satisfaction and feedback surveys are administered to audience members and performing artists after events. Ticketing software (ShoWare) will indicate sales performance. Staff reports on effectiveness of pursuit of sponsors and financial support.

**Examples of Program Success**

The 9th Annual BCMFest (January 2012) was the first under the purview of Passim, and paid attendance increased 40% over the previous year. A monthly series to promote the fest was established and will support itself at Club Passim through 2012. This is the first year a festival program will be published, with costs covered by donations and contributions from organization sponsors.

## Passim Iguana Music Fund

<b>Description</b>	The Passim Iguana Music Fund fosters a vibrant and exciting music community in New England through seed grants to aspiring local artists for music-related projects. The Passim Iguana Music Fund awards grants between \$500 and \$2,000 to individual artists with an affiliation to New England either by residence or tour history for specific career building and community service projects. Areas of support may include (but are not limited to): recording or manufacturing assistance, publicity & marketing support, instrument repair or replacement, additional equipment & instruments, special projects and other specific activities promoting artistic and/or professional growth. Since inception, the Fund has given out more than \$200,000 in grants. Two of its recent grantees have been nominated for Grammy's.
<b>Budget</b>	57000
<b>Category</b>	Arts, Culture & Humanities, General/Other Music
<b>Population Served</b>	Other Named Groups, ,
<b>Program Short Term Success</b>	Increase giving amount in 2012 from \$30,000 to \$50,000. Double the number of eligible artists who apply. Double the number of eligible artists who receive funding. Enable funding for multiple-year projects without requiring artists to reapply.
<b>Program Long term Success</b>	The establishment of an endowment would enable the Fund to provide grants on a rolling basis to any deserving performing artist or songwriter who demonstrates a need. This would enable artists to grow their seed grants into a fully funded project. In a broad sense, the fund's success can be seen if the music community in New England continues to prosper, because artists will receive the support they need in order to create their music.
<b>Program Success Monitored By</b>	Size of the Fund indicates how many grants we can award. One anonymous donor, the founder of the Fund, participates on planning/selection committee. Size of applicant pool. A set of requirements for selected artists is published as part of the application process, and each sends copies or documentation of completed projects which were aided by the Fund.

## Examples of Program Success

This is the 5th year that Passim Iguana Music Fund grants have been distributed. Last year's recipients numbered more than ever before. Last year, 20 different artists received grants, totaling \$30,000. During the lifespan of the Fund, over \$100,000 total has been granted to more than 65 artists. This is the first year that the Fund will distribute "mini-Iguana" grants of \$25 to help with public crowdsource fundraising efforts throughout the year.

From musician Alastair Mook: "The Iguana Music Fund Grant allowed me to help finance my first specifically family music album, which was a new direction for me. As it's turned out, the album has been my most successful project to date, as well as one of the most rewarding, and has sent my music career off on a new tangent. The album won a 2010 Parents' Choice "Recommended" Award, was short-listed for the 2010 American Library Association Notable Children's Recordings List, and was a Boston Children's Music Favorite Album of the Year."

## Passim School of Music

### Description

Founded in 2000, the Passim School of Music offers classes, master classes, workshops, and private lessons to adults in a fun and informal setting. Part of the Passim mission is to create and encourage a vibrant music community, and the school helps accomplish this.

A range of diverse classes, which cater to different experience levels, allows students to try their hand at guitar, mandolin, banjo, fiddle, harmonica, voice, and more. The heart of our school is the ensemble program, in which students learn how to collaborate in a band-like setting. Many students return term after term to the camaraderie and fun of the ensembles.

Several times per year, students perform on the Club Passim stage at all-school recitals and ensemble showcases. Instructors are a mix of local musicians and visiting artists, many of whom play at the Club. This gives students the rare opportunity to work with an artist as an instructor, and then see the artist perform on the Club Passim stage.

### Budget

125000

### Category

Arts, Culture & Humanities, General/Other Music Instruction

### Population Served

Adults, College Aged (18-26 years), General/Unspecified

### Program Short Term Success

Short-term success can be defined in a variety of ways:

- One student writing a song to share with his class, family and friends.
- A group of students meeting in class, and going on to form their own band to play at local music venues.
- A group of students attending a concert by their instructor or a musical inspiration at a local music venue.
- A student who also teaches at a children's school sharing what she learns in class with her students in her own classroom.
- A scholarship student having the opportunity to learn an instrument or express himself through song.

### Program Long term Success

Ultimately, the goal of the School is to ensure that live music and its community of fans and artists prosper. The School ensures that people will continue to learn and play music, and come together to perform at their own shows and attend other musicians' shows. Musicians will be able to make a liveable wage through a combination of performing and teaching. The School helps ensure that people will continue to listen to music, see it live, and create their own music.

**Program Success Monitored By** Program success is monitored through a variety of qualitative and quantitative tools:

- Instructor feedback
- Student surveys
- Enrollment in classes
- Student participation in performance opportunities
- Audience attendance at recitals
- Tuition income
- Number of classes that run, compared to number of classes offered
- Number of visiting artists who teach a workshop

**Examples of Program Success**

- Enrollment increased from 366 in 2008 to 723 in 2011.
- Many students take multiple classes per term, and continue to take classes for several years.
- Students form bands and continue to play together after the class ended.
- The ensembles perform sets at the campfire. festival at the Club.
- Passim has expanded and improved its classroom space with aesthetic and practical improvements (soundproofing, paint, new furniture, new carpet).

Student Pleuni Pennings: "I came to the US two years ago [and] decided that I wanted to learn to play American music. What better way to get to know a country and a local community than by its music? The Passim School of Music is a great place to do this. I took the Honky-Tonk class and guitar lessons and I learned to play songs by Hank Williams, Patsy Cline, Dolly Parton, Johnny Cash. I enjoy the classes and the recitals very much. Being around the instructors and the other students also inspired me to go to more concerts at Passim and elsewhere."

## Passim Outreach

### Description

Passim has a strong presence in the Cambridge community throughout the year, often collaborating with the Harvard Square Business Association, Cambridge Arts Council, Berklee College of Music, and other local businesses. Passim presents a stage at Harvard Square's Mayfair festival in the spring and Harvard Square's Oktoberfest festival in the fall. During the summer, Passim hosts the weekly Kendall Square Concert Series, in partnership with Boston Properties at Cambridge Center. The Passim/Berklee Music Series is held weekly in Harvard Square, all summer long. In 2014, in partnership with the City of Cambridge, Passim initiated a free outdoor biweekly summer series in Danehy Park. Passim hosts or co-hosts several festivals each year including campfire., the Passim Bluegrass Festival, Harvard Square Folk Festival, and New England Americana Festival. Passim also opens its doors to the Cambridge community for personal celebrations, book releases, benefits, and other special events.

### Budget

16000

### Category

Arts, Culture & Humanities, General/Other Music

### Population Served

Families, Adults, Children and Youth (0 - 19 years)

### Program Short Term Success

Short-term, we hope to increase attendance at our outreach concerts, give musicians more opportunities for paid work (to allow them to make a liveable wage), and increase the community's involvement and knowledge of the local music scene. We also hope to expose the public to artists they might not have otherwise encountered, building the music community of musicians and audiences.

### Program Long term Success

Passim hopes to make music accessible to all, and our free outreach programs are a vital piece of that. Many people do not have the financial means to purchase concert tickets, so we intend to bring people together at these free concerts, giving them an opportunity to experience and enjoy live music at no cost. Additionally, our long-term success is defined by an overall increase in the community's awareness of independent artists representing a wide variety of music. The community will have a greater appreciation for music and the arts, and ideally a greater involvement -- through attendance at concerts, enrollment in classes/workshops, or making their own music. These concerts enrich the community and encourage residents of nearby towns to come to Cambridge for the music; this has a trickle down effect, and increases business for local merchants and restaurants.

**Program Success Monitored By** Program success can be measured through the following means:

- Attendance at outreach concerts
- Amount of merchandise purchased and number of mailing list signups for artists at outreach concerts
- Attendance at those artists' shows at Club Passim, as well as surveys to those audiences inquiring how they heard about the show/artist

**Examples of Program Success**

- Mayfair and Oktoberfest are historically attended by over 100,000 people, many of whom enjoy the free live music on the Passim stage.
- The Kendall Square Summer Concert Series attracts 60+ people to events each week, bringing the arts to the tech- and science-centric Kendall Square.
- The Harvard Square Summer Concert Series brings 60+ people to concerts each week, including young families, retirees, tourists, and Harvard Square employees.

From Denise Jillson, Executive Director, Harvard Square Business Association: “[Passim's] street presence at Harvard Square events, be it Mayfair, Oktoberfest, Folk Music Month or the Taste of Cambridge, is valued and appreciated. Passim’s reputation for securing the most interesting, diverse and highly talented performers is widely recognized, as is their ability to attract an audience from across the city, to across the country [...] Passim’s cultural contribution is legendary; their economic contribution cannot and should not be underestimated.”

## **Club Passim**

### **Description**

Club Passim is a 110-seat concert venue presenting over 430 shows for more than 30,000 patrons a year. Programming focuses on mostly acoustic genres of music but does branch out to electric bands, comedy and storytelling. Club Passim is the direct descendent of Passim and Club 47, with a history stretching back to 1958. Throughout its various incarnations, it has been a proving ground for new artists and a place for them to hone their skills as songwriters and performers. The Open Mic creates an opportunity for artists to develop performance skills in front of an audience of listeners and peers. Our campfire festival provides entry-level opportunities for artists to begin to develop an audience and work towards having a sustainable career in the arts. Club Passim maintains a relationship with artists throughout their careers, from open mics to headlining shows.

### **Budget**

719000

### **Category**

Arts, Culture & Humanities, General/Other Music Performances Presenting

### **Population Served**

Adults, Children and Youth (0 - 19 years),

### **Program Short Term Success**

At least 50% of the performers that come out of our campfire festival develop into opening acts, multi-act bills or headliners within two years of their initial performance. 75% of artists that play on our stage at least once every two months will become headlining acts within a year. Creating more opportunities for performances with late-night and morning and afternoon matinees has increased our ability to widen our audience and increase attendance.

### **Program Long term Success**

Club Passim will increase and expand its audience, bringing the arts to over 50,000 patrons annually. The Club will continue to create stage opportunities for performers to increase their audience and move on to larger venues, where many more people will hear their music. Artists will continue to experiment and push their creative boundaries at Passim, encouraged by attentive and appreciative audiences.

- Program Success Monitored By** Club Passim's success is measured by a mix of quantitative and qualitative metrics.
- Ticket sales and show attendance: Using our ticketing system, we track attendance at specific shows and overall. If attendance continues to increase, we are presenting a variety of high caliber music that appeals to a wide audience.
  - High demand by artists for performance opportunities: This is measured by the volume of emails and communication from artists to the managing director of the Club. If we continue to see significant artist interest in playing at the Club, we are providing a positive performance experience for musicians, while creating an atmosphere that attracts an attentive, appreciative audience.
  - Surveys: We survey patrons and members about their experience at the Club, often focusing on different aspects from artist quality to atmosphere and comfort level.
  - Open rates & signups for e-newsletter: This metric demonstrates how much patrons want to engage with Passim and our programming.

**Examples of Program Success** Increasing our family programming on weekend mornings and afternoons with different showtimes and more accessible ticket prices has brought in an audience that we weren't previously reaching. By switching to earlier showtimes attracts audiences, we have found acts selling out their shows quicker and more frequently. Bringing the Open Mic back after a hiatus has brought a revived community of beginning songwriters and musicians that will develop, over time, into our marquee performers.

Ellis Paul, musician, describes the Club's impact: "This club is the petri dish from which a thousand artists have sprung... without it there may have been a hole in the middle of the American music scene... no Shawn Colvin, Suzanne Vega, Joan Baez, god knows who else. Without Joan Baez, where would Bob Dylan be, without Dylan, where would [...] This place is a sacred national historical landmark to anyone who knows and cares about the songwriter."

## Program Comments

### **CEO Comments**

We have made a clear commitment to focus on our core competency of building community and developing artists. Our work with the Harvard Business School Association of Boston's Community Action Partners has taught us that we must stick to what we do best and do that as well as possible. This has had several significant consequences, the biggest of which is that we are concentrating on ensuring that the experience people have in our Club is truly excellent, inspirational and interactional. This means a major renovation to the Club – improving the kitchen, the bathrooms, green room, sound system, etc., while preserving the iconic atmosphere and ambience that so many have come to cherish. A major part of this will be to make the Club handicap accessible – a difficult, but absolutely worthwhile project. To accomplish this, we will be launching a capital campaign in the future.

# Management

## CEO/Executive Director

**Executive Director**

Mr. Daniel Bolten Hogan J.D., Ph.D.

**Term Start**

July 2008

**Email**

dan@passim.org

**Experience**

Dan Hogan became executive director of Passim in 2008. He brings a wealth of nonprofit experience with volunteer work and serving on a host of volunteer boards, several of which he has chaired.

Previously, he worked for three decades as a management consultant, specializing in leadership development, executive assessment, and coaching. His clients included Pfizer, Merrill Lynch, Mercedes Benz (SA), and Harvard's Alumni Affairs and Development.

Dan presently serves on the Standex International Corporation board of directors and on the executive board of the Harvard Square Business Association. Dan was a licensed psychologist and a member of the Massachusetts Bar for many years. He has served on the faculty at McLean Hospital and also at Harvard University in the Department of Psychology. He is a fellow of the American Psychological Association and a life member of the Massachusetts Psychological Association.

Dan is the author of more than a dozen publications, which have been published in the New York Times and the Harvard Journal on Legislation. Contemporary Psychology called his four-volume series on professional regulation, "the most comprehensive and most stimulating publication on the matter."

Dan has three children and lives in Cambridge, Massachusetts. He is an avid squash player, current state champion in his age group, and has consistently been ranked in the top 10 nationally in his age group. Dan is a member of the Yale Class of 1965 Council and headed up his 50<sup>th</sup> reunion at Exeter, where he received the President's Award for "Outstanding Commitment and Service to the Academy."

Dan received his bachelor's degree from Yale University and his law degree from Harvard Law School. He holds a doctorate in Psychology from Harvard University.

## Former CEOs

<u>Name</u>	<u>Term</u>
Mr. Stephen Baird	1995 - Jan 0
Ms. Betsy Siggins	Jan 1997 - July 0

## Senior Staff

**Mr. Matthew Williams Smith**

**Title**

Managing Director

## **Experience/Biography**

Matt Smith was a patron of Club Passim for two years and a volunteer at the Club for three months before he began working at Club Passim as a performance manager in the summer of 1995. Two years later, he became a full-time manager. He has also worked for Young/Hunter Management (Peter Mulvey, Chris Smither, Dar Williams, Richard Shindell) and was one of the founders of FolkWeb, a now-defunct, online folk-merchandise store.

Since beginning his career in the music world, Matt has been on panels and advisory committees at the Falcon Ridge Folk Festival, the International Folk Alliance, and the Northeast Regional Folk Alliance. He has worked as a tour manager and sound engineer for the singer-songwriter collaborative, Live From New York (Edie Carey, Teddy Goldstein, Anne Heaton, and Andrew Kerr) and the Celtic band Halali (Hanneke Cassel, Laura Cortese, Lissa Schneckeburger, and Flynn Cohen). Matt has also been a stage emcee at the Falcon Ridge and the Newport Folk Festivals, and he is the founder of Club Passim's campfire. festival.

As the manager of Club Passim, Matt's duties include overseeing and training all of the Club's management staff, booking and developing new talent, booking and coordinating campfire. festival, and booking special events. Matt also lays out Passim's bi-monthly newsletter and night manages several shows at the Club per week.

## **Ms. Hannah Rose Baker**

### **Title**

School of Music Coordinator

### **Experience/Biography**

- Sarah Fleischmann graduated from Tufts University in 2008 with a degree in child development and a minor in communications and media studies. She discovered her love for the music industry when she joined the executive board of the Tufts Concert Board. She cemented this love after working music-related internships at Netzwerk Management and Braithwaite and Katz PR. Sarah was an intern at Club Passim before joining the staff as a utility player. She later became the education and outreach director.

Today, Sarah runs the Passim School of Music, where she schedules classes, hires instructors, publicizes and markets the school, and works with students and instructors to create a supportive and creative learning environment. She organizes community outreach programs and events, often collaborating with other local organizations, to bring celebrations like the Passim Summer Concert Series and Mayfair to life. Sarah also works on the Passim marketing and development team.

**Ms. Elisabeth Rhodes**

**Title**

Chief Financial Officer

**Experience/Biography**

Lis Rhodes is a member of an internationally recognized accounting organization, Association of Chartered Certified Accountants, and holds a business degree from City University Business School, London. She spent a year at Chelsea Art College studying interior design and has a broad interest in the arts.

A British transplant, Lis came to the United States in 2010. While she was still in the United Kingdom, Lis was the financial controller for a non-profit development agency and managed the finances for an architectural practice. She spent three years working in the South of France, where she implemented all of the financial systems for an Internet start-up company. She has also worked as a senior financial analyst in large corporate environments for companies in various industries including insurance (Aviva) and engineering (Rolls-Royce).

At Passim, Lis controls the day-to-day running of all financial processes, as well as production of management reports, analysis and co-ordination of budgeting, and forecasting. Passim has been a new and exciting experience for Lis; she has loved the shows that she has seen since working here.

**Mr. Jon Dorn**

**Title** Outreach & Technology Coordinator

**Experience/Biography** Benjy Kantor officially joined the Club Passim team in December 2011, but his professional association with the organization began much earlier. In 1999, during one of the Club’s early campfire festivals, Benjy was the promotions and publicity director for RadioBoston.com, a commercial broadcaster that streamed live shows from Passim online.

More recently, Benjy worked for seven years as the artist and promoter relations manager at Sonicbids, where his clients included SXSW, CMJ, International Folk Alliance, Falcon Ridge Folk Festival, Rolling Stone, Planetary Group, Universal Pictures, Cash Cabin Studios, East Coast Music Association, Bumbershoot, and the John Lennon Songwriting Contest. He was also a member of the company’s business development team.

Benjy is a graduate of Brandeis University; he studied African & African-American studies and women’s studies. He is an avid fan of the school’s division III basketball teams. Go Judges!

Born in Athens, Georgia and raised in Evanston, Illinois, Benjy now lives in Brookline, Massachusetts with his wife, Lindsey, an independent jewelry designer, and their two large cats. He also likes baseball.

**Ms. Courtney Gallagher**

**Title** Membership & Communications Coordinator

**Experience/Biography**

Staff Information

<b>Full Time Staff</b>	4
<b>Part Time Staff</b>	9
<b>Volunteers</b>	29
<b>Contractors</b>	0
<b>Retention Rate</b>	80%

Staff Demographics - Ethnicity

<b>African American/Black</b>	0
<b>Asian American/Pacific Islander</b>	0
<b>Caucasian</b>	6
<b>Hispanic/Latino</b>	0

<b>Native American/American Indian</b>	0
<b>Other</b>	0 0

### Staff Demographics - Gender

<b>Male</b>	3
<b>Female</b>	3
<b>Unspecified</b>	0

### Formal Evaluations

<b>CEO Formal Evaluation</b>	Yes
<b>CEO/Executive Formal Evaluation Frequency</b>	Annually
<b>Senior Management Formal Evaluation</b>	Yes
<b>Senior Management Formal Evaluation Frequency</b>	Annually
<b>NonManagement Formal Evaluation</b>	Yes
<b>Non Management Formal Evaluation Frequency</b>	Annually

### Plans & Policies

<b>Organization has a Fundraising Plan?</b>	Under Development
<b>Organization has a Strategic Plan?</b>	Under Development
<b>Does your organization have a Business Continuity of Operations Plan?</b>	No
<b>Management Succession Plan?</b>	No
<b>Organization Policy and Procedures</b>	Yes
<b>Nondiscrimination Policy</b>	Yes
<b>Whistleblower Policy</b>	Yes
<b>Document Destruction Policy</b>	No
<b>Directors and Officers Insurance Policy</b>	Yes
<b>Registration</b>	Yes
<b>Permit?</b>	Yes

### Collaborations

Berklee College of Music

Weekly free summer concert music series with Berklee students performing and Berklee interns providing operational help

Monthly Berklee American Roots night at Club Passim in which Berklee performers take over the stage for the evening.

Harvard Square Business Association

Passim provides a stage for music at both Mayfair and Oktoberfest - two major all-day festivals. Passim also provides facilities and artists for the New England Folk Festival

## Awards

### **Awards**

<b>Award/Recognition</b>	<b>Organization</b>	<b>Year</b>
Top 10 Cities With the Best Music Scenes Outside of Nashville NYC and LA	Livability	2012
Boston's Best Live Music	TimeOut Boston	2011
Best Folk Venue Winner	Boston Phoenix	2010
Best Folk Venue Winner	Boston Phoenix	2009
Best Folk Venue Winner	Boston Phoenix	2008
America's 40 Best Venues	Paste Magazine	0
Best Live Music Venue Nominee	Boston Music Awards	2011
Cultural Investment Partner	Massachusetts Cultural Council	0
ableGiving Grant Recipient	AbleBanking	2012
Citysearch 4 Stars	Citysearch	0
Boston Best Live Music Finalist	City Voter	2011
Best Boston Nightlife	AOL Travel	0
Best Folk Venue/Club	About.com	0
Best Open Mic Nights Across America	About.com	0
Top 10 Best Venues and Clubs for Acoustic Music in USA	International Acoustic Music Awards	0
Best Nightlife: Boston, MA Live Music	10best.com	0
1,000 Greatest Places in Massachusetts	The Commonwealth of Massachusetts	0
Best Small Folk Venue in the U.S.	Folk Alliance International	2007
Top 7 Promoting the Arts Nonprofits	Nerd Wallet	2012
Best Small Venue, Camberville	Dig This	2012
Best Roots Club	Red Line Roots	2013
Best Micro Venue	Dig This	2014

## Comments

### **CEO Comments**

Please see the challenges and opportunities discussed in the "Governance" section.

# Board & Governance

## Board Chair

<b>Board Chair</b>	Mr. Jeremiah Morgan Potts
<b>Company Affiliation</b>	MSF Investment Management
<b>Term</b>	Jan 2015 to Dec 2016
<b>Email</b>	jpotts@mfs.com

## Board Members

<b>Name</b>	<b>Affiliation</b>	<b>Status</b>
Mr. Daniel G. Booth	Booth Sweet, L.L.P.	Voting
Mr. Jaime C. d'Almeida	Duff & Phelps, L.L.C.	Voting
Ms. Nancy L. Darish	Constant Contact	Voting
Ms. C. Gail Greenwald	Clean Energy Venture Group	Voting
Mr. Daniel Bolten Hogan	Passim	Exofficio
Mr. Ralph Alexander Jaccodine	Ralph Jaccodine Management	Voting
Ms. Patty H. Katsaros	P.H. Koules Consulting	Voting
Mr. James Patrick Kelly C.P.A.	Cabot Corporation	Voting
Mr. Peter J. Kolovos	WilmerHale	Voting
Mr. Charles G. McDermott	Fayerweather Street School	Voting
Mr. Ronald M. Pastore	AEW Capital Management, L.P.	Voting
Mr. Brad Paul	Brad Paul Media	Voting
Mr. Diogo B. Teixeira	Retired	Voting
Mr. James H. Wooster	GlobalPost	Voting

## Board Demographics - Ethnicity

<b>African American/Black</b>	0
<b>Asian American/Pacific Islander</b>	0
<b>Caucasian</b>	13
<b>Hispanic/Latino</b>	1
<b>Native American/American Indian</b>	0
<b>Other</b>	0 0

## Board Demographics - Gender

<b>Male</b>	11
<b>Female</b>	3
<b>Unspecified</b>	0

## Board Information

<b>Board Term Lengths</b>	2
<b>Board Term Limits</b>	3
<b>Number of Full Board Meetings Annually</b>	6
<b>Board Meeting Attendance %</b>	78%
<b>Written Board Selection Criteria?</b>	Yes
<b>Written Conflict of Interest Policy?</b>	Yes
<b>Percentage Making Monetary Contributions</b>	
<b>Percentage Making In-Kind Contributions</b>	25%
<b>Constituency Includes Client Representation</b>	Yes

## Standing Committees

Board Governance

Building

Development / Fund Development / Fund Raising / Grant Writing / Major Gifts

Executive

Finance

Marketing

Personnel

Program / Program Planning

Strategic Planning / Strategic Direction

## Comments

### **CEO Comments**

We have 3 opportunities/challenges facing our organization.

The first is to renovate the Club to improve the musical experience for our patrons and to make it accessible to all, including those with disabilities. Since any work on our space will trigger full ADA compliance for the whole building, we are working with our landlord to see how we might accommodate our plans with the financial and logistical issues that they create for Harvard, which owns the building. We have developed architectural plans with detailed cost estimates for the work.

The second opportunity comes with the restaurant closing that supplied us with food and beverage and which was a subtenant in our space. The immediate challenge is making up for the lost rent.

However, this constitutes a meaningful opportunity to better fulfill our mission. We plan to add morning concerts during the weekday for children and their parents to complement the weekend family concerts we now present. We can offer lunchtime concerts for our patrons, which will provide a new opportunity for artists to play the Passim stage. We currently put on more than 425 concerts per year, but soon could be doubling that number.

The third opportunity for Passim is to migrate our various databases over to an integrated third-party solution and integrate that with a new website. We have identified a vendor and hope to make the transition within the year. In doing so, we would replace our email program, donor and member database, ticketing database, tuition database and various Excel spreadsheets.

# Financials

## Fiscal Year

<b>Fiscal Year Start</b>	July 01, 2014
<b>Fiscal Year End</b>	June 30, 2015
<b>Projected Revenue</b>	\$1,489,331.00
<b>Projected Expenses</b>	\$1,556,891.00
<b>Endowment?</b>	No
<b>Spending Policy</b>	N/A
<b>Credit Line?</b>	Yes
<b>Reserve Fund?</b>	No
<b>Months Reserve Fund Covers</b>	0

## Detailed Financials

### Revenue and Expenses

<b>Fiscal Year</b>	<b>2014</b>	<b>2013</b>	<b>2012</b>
<b>Total Revenue</b>	\$1,316,714	\$1,908,044	--
<b>Total Expenses</b>	\$1,204,290	\$1,876,254	--

### Revenue Sources

<b>Fiscal Year</b>	<b>2014</b>	<b>2013</b>	<b>2012</b>
<b>Foundation and Corporation Contributions</b>	--	--	--
<b>Government Contributions</b>	\$0	\$0	\$0
<b>Federal</b>	--	--	
<b>State</b>	--	--	
<b>Local</b>	--	--	
<b>Unspecified</b>	--	--	
<b>Individual Contributions</b>	\$303,202	\$298,762	--
<b>Indirect Public Support</b>	--	--	--
<b>Earned Revenue</b>	\$837,135	\$1,366,839	--
<b>Investment Income, Net of Losses</b>	--	--	--
<b>Membership Dues</b>	\$100,399	\$155,361	--
<b>Special Events</b>	--	--	--
<b>Revenue In-Kind</b>	\$62,650	\$75,746	--
<b>Other</b>	\$13,328	\$11,336	--

### Expense Allocation

Fiscal Year	2014	2013	2012
Program Expense	\$972,006	\$1,440,896	--
Administration Expense	\$167,509	\$240,174	--
Fundraising Expense	\$64,775	\$195,184	--
Payments to Affiliates	--	--	--
Total Revenue/Total Expenses	1.09	1.02	--
Program Expense/Total Expenses	81%	77%	--
Fundraising Expense/Contributed Revenue	21%	65%	--

### Assets and Liabilities

Fiscal Year	2014	2013	2012
Total Assets	\$342,047	\$213,281	--
Current Assets	\$310,900	\$164,824	--
Long-Term Liabilities	\$0	\$0	--
Current Liabilities	\$87,437	\$71,095	--
Total Net Assets	\$254,610	\$142,186	--

### Short Term Solvency

Fiscal Year	2014	2013	2012
Current Ratio: Current Assets/Current Liabilities	3.56	2.32	--

### Long Term Solvency

Fiscal Year	2014	2013	2012
Long-Term Liabilities/Total Assets	0%	0%	--

### Top Funding Sources

Fiscal Year	2014	2013	2012
Top Funding Source & Dollar Amount	--	--	--
Second Highest Funding Source & Dollar Amount	--	--	--
Third Highest Funding Source & Dollar Amount	--	--	--

## Capital Campaign

**Currently in a Capital Campaign?**

Anticipated In 3 Years

### Campaign Purpose

Significant renovations to our historic venue - Club Passim - site of our predecessor organization, the venerable Club 47, plus integrated relational database, new mobile-friendly website, and possible endowment.

## Comments

### CEO Comments

After many years of running a deficit and carrying a large debt load, we now have had 6 years of surpluses from 2009-2014, eliminated all debt and built up our net assets. We have built up our cash reserves to over \$200,000 at the end of FY14 and established a significant line of credit. We will be needing a significant portion of our cash reserves for FY15 to tide us over while we take over the food-and-beverage service for our Club that a vegetarian restaurant formerly provided. In addition we hope to migrate several of our databases (ticketing, membership, donations, email) to a unified integrated database, along with finalizing a plan to improve the musical experience of those attending our concerts and to make it fully accessible, including those with disabilities.

In terms of sources of revenue, Club Passim through its ticketing accounts for more than half our revenues. We receive anywhere from one quarter to one third of our income from donations and other development activity. Other significant sources of income include tuitions from our School of Music, income from our food-and-beverage service, and beer-and-wine sales. On the expense side of the ledger, artist fees, payroll (salaries, health insurance, payroll taxes, independent contractor fees, etc.) and rent are our three largest items.

**Foundation Staff Comments**

Please note, the financial data posted for FY2013 covers an 18 month period due to a change in fiscal year. Financial summary data in charts and graphs are per the organization's audited financials. Contributions from foundations and corporations are listed under individuals when the breakout was not available.