

League of American Orchestras

Volunteer Council

Minutes of Strategic Conversations – Presidents & President-Elects

Conversation #4 – Fundraising

Tuesday, November 10, 2015

3:00 EST

Facilitators:

Linda Weisbruch (president, Volunteer Council)
Terry White (secretary, Volunteer Council)
Caitlin Whealon (meetings and logistics coordinator, League of American Orchestras)

Participants serving orchestras in:

Group 1: (2) Midwest 1, West 1
Group 2: (1) Southeast/Middle Atlantic 1
Group 3: (4) Midwest 1, Southeast/Middle Atlantic 1, South/Southwest 2
Group 5: (1) West 1
Group 6: (1) Southeast/Middle Atlantic 1

Conversation #4: Fundraising – Donors & Sponsorships

The conversation began with an overview of fundraising projects particular to each organization, including the age and/or frequency of the event.

Linda shared some fundamental practices for donor development. She prefaced her remarks by stating that the best development tools are information and preparation, regardless of the fundraising platform (designer house, gala, direct appeal). And, the primary fundamental in attracting donors is to know your organization!

Be prepared

- Gather facts about your symphony: the mission especially (donors definitely want to know what they are supporting!)
- Make sure you know goals, budget, corporate sponsors, and 501(c)(3) non-profit status.
 - Be sure to coordinate with your symphony development staff to delineate which donors will be approached by each organization
- Have plenty of promotional materials such as season brochures, your volunteer brochure, as well as special events and educational projects
- Know and promote the history of the *Symphony* and your volunteer organization in your community
- Demonstrate your passion for the mission

- Let the League be of assistance: There is a lot of material available from the League website, including research results, toolkits, grant information, and educational videos.

Be ready to represent your organization in the community as one that attracts and merits financial support.

- Create an image of confidence, knowledge, and professionalism
- Know and share the impact of your fundraising goals on the overall success of your orchestra
- Make sure that you provide training and practice in how to make an “ask” – fundraising does not just come naturally to all
 - Don’t forget to research the prospective donor – be sure to align the ask with the corporate/individual charitable focus
 - Rather than have a one size fits all approach to donor level benefits, tailor these to what you think that particular donor would value – don’t be afraid to talk about it

Create a culture within your organization where many members are responsible for fundraising

- Recognize success internally and externally
 - Celebrate every success with your members – give kudos all the time
 - Recognize donors in promotional materials, on invitations and programs, on your websites, etc.
 - Caveat: be sure to respect the desires of each donor for anonymity, etc.
 - Encourage/facilitate the honorarium or memorial – always make that option available
 - Identify and encourage the in-kind donation where appropriate
- Create a donor cultivation plan to reach out to donors throughout the year, not just when the funding is needed.

To further illustrate some fundraising fundamental practices, Linda then posed a series of questions for the participants, including:

1. How do you assess the success of an event?
 - One Group 6 evaluates the return on the investment, and they consider volunteer involvement; there is no committee that makes the determination
 - A Group 1 has the event committee do a self-critique.
 - Another Group 1 does a projection on the profit for the fundraiser using various variables; following the event, they do a profit/loss assessment to rate the success and they discuss what worked and didn’t work
2. Does anyone use the 60/40 ratio? For instance, if your net income is 60% of gross income, would you assess that a successful event? Does anyone look at trends? If things are trending downward, when do you look at reworking your event?
 - One Group 1 has a long range planning committee looking at these issues
 - A VP of projects has a committee looking at fundraising over the last 10 years, as well as evaluating possible new projects, but also ascertain that a
 - Rule of thumb: must be sure a new project will make as much money before scraping an old project.
3. Does anyone have a sacred cow project that is having problems?
 - One Group 3’s showhouse is plateauing; a huge event and, while it made \$200K, it took so much to pull off
 - Membership voted to keep it
 - Currently streamlining it and making it a one-day event.
4. How many have a pipeline for new projects and how are new ideas generated?

- One Group 5 said the Gold Book is their bible for projects; they look at what other people are doing and visit other organizations' websites.
5. Does anyone have a donor cultivation plan?
- One Group 1 has started a database this year of attendees who were not members.
6. Does your orchestra have a development staff? What is your relationship?
- One Group 3 has five members on the orchestra board and are invited to their programs.
 - One Group 2 a good relationship with their orchestra's development vice president; she sits on their volunteer board, and two volunteer members serve on their orchestra board.
 - One Group 1 has new staff and is working on creating a working relationship.

The Los Angeles Philharmonic Affiliates chair was a special presenter this week. He was invited to share an overview of the Phil's fundraising workshops. There are 16 separate volunteer organizations in the Los Angeles area supporting the orchestra. This project was presented at the League of American Orchestra's Conference in Seattle to great acclaim. An outline of the presentation had been distributed to participants prior to this week's discussion.

The first few minutes overviewed (pp1-2) the LA Phil's history and relevant statistics. It was noted that the first affiliate, the Women's Committee, was founded in 1923.

Orchestra/volunteer relationship in the overall organization was then discussed. All but one of the LA affiliate groups operate under the orchestra's 501(c)(3). The LA Phil CEO understands and appreciates the affiliates' role. This permeates the organization – it is driven for the top. Hence, the development VP reports directly to the CEO, and the volunteer relationship is nurtured.

In addition, all affiliate events involve the manager and coordinator of Volunteer Activities. Each affiliate has a staff development mentor that is specifically selected for the affiliate, and the development department sets fundraising goals for each affiliate. The orchestra presents an annual fundraising workshop which is a collaboration between development department and affiliate leadership which forges a closer partnership.

Here is overview of a recent workshop:

Tools for Your Toolbox Workshop

Sixty people attended this workshop. It was a roundtable format, with information presented by experts. Topics included:

- "Ideas from LAO & AMSOV Conferences"
- "Planning Your Fundraiser: Expert Advice"
- "Donor Solicitation Tips"
- "The Power of Words: Tips for Letter Writing, Thank You Notes Etc." and
- "Affiliate Committee Exchanges"

This program began with an overview by the development director. Points discussed include:

- Any volunteer raising money needs to well versed on the symphony goals.
- There must be communication between the volunteer and the development department.
- Mutual respect is very important.

As 4:00 approached, several participants expressed a need for more time to study the hand-outs, as it was delivered shortly before Strategic Conversation #4 took place. We agreed that further discussion would be the first item on the agenda for Call #5.

Conversation then continued briefly. Questions from participants included:

- Were there conclusions or results drawn from these workshops?
 - No summary or notes were taken, but will be considered for next year.
- Was there a specific format for the roundtables?
 - There was no specific format for the roundtables, and each expert handled the presentation differently. There were 3 rotations of 20 minutes each. Participants selected topics in advance.

The Conversation closed at approximately 4:10 pm EST. The next conversation (#5) will pick up on this subject next **Tuesday, November 24th at 3 pm ET**. In closing, Linda thanked the LA Phil for its excellent presentation and for sharing their ground-breaking programs for volunteers.