

League of American Orchestras

Volunteer Council

Minutes of Strategic Conversations – Presidents & President-Elects

Conversation #5 – Fundraising

Tuesday, November 24, 2015

3:00 EST

Facilitators:

Linda Weisbruch (president, Volunteer Council)
Debbie McKinney (president-elect, Volunteer Council)
Terry White (secretary, Volunteer Council)
Samara Ungar (manager of the annual fund, League of American Orchestras)
Caitlin Whealon (meetings and logistics coordinator, League of American Orchestras)

Participants serving orchestras in:

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

Conversation #4: Fundraising – Donors & Sponsorships

The fifth Strategic Conversation was a continuation of our discussion on Fundraising. To begin, we invited Samara Ungar, manager of the League's Annual Fund, to talk about GivingTuesday.

Samara explained that GivingTuesday, a global phenomenon, is widely used for fundraising. Created in 2012 as a response to the growing trend of events such as Black Friday, Small Business Saturday, and Cyber Monday, GivingTuesday has inspired a worldwide philanthropic movement. In many instances, non-profits have joined forces and started community-wide or state-wide GivingTuesdays. Last year, more than 27K people participated, and local communities benefited greatly. It will take place this year on December 1st.

There are several reasons why this particular day was selected.

1. It marks the beginning of year end giving
2. It continues the thanksgiving purpose/feeling
3. It creates an opportunity for consumers who saved money on Black Friday and Cyber Monday to give back some of those savings to charitable organizations

GivingTuesday could also be the perfect time to thank volunteers for giving their time and energy, encourage volunteers to engage more, and recruit new volunteers. Per Samara, the League is using GivingTuesday both as the kick off for its end of year appeal and to reach out to lapsed donors. Next year, Samara hopes that the League will also use GivingTuesday to focus on giving back to community through some type of community service project in addition to requesting donations. She suggested everyone take a look at whatever their orchestras are planning and consider partnering with them.

Linda further explained GivingTuesday is not a replacement for the traditional annual fund appeal or year-end drive. It presents the opportunity for people to reach out to multiple groups of interest and make nominal gifts. The day is very much about the impulse to give back and not necessarily about large gifts. One participant suggested every Tuesday should be a giving Tuesday. For more information, Samara suggested everyone visit "givingtuesday.org" for more information. The site is really well set up with materials for organizations to use in their own GivingTuesday campaigns.

The conversation around the LA Phil workshops continued. These workshops cover membership as well as fundraising. The Fundraising Workshop is a collaboration between the affiliate groups' leadership and the LA Phil development department; the next one is scheduled for April, 2016. Because the workshop breaks into small groups, participants might talk about fundraising in general and then look at types of fundraising events. For example, they explored planning a pre-event where attendance required bringing a silent auction item to be used in an upcoming silent auction. The organizers are currently exploring topics in which they are interested for the next workshops. One possible consideration would be a panel of the most successful fundraisers.

The Conversation turned to staff/volunteer collaboration, and asked the group to provide discussion points for a template for staff and volunteer discussions. Participants' responses included:

- From the very first word spoken, ask how volunteer group can best serve the orchestra's development department
- Be sure to share in advance the various projects and events under consideration
 - remember, one cannot over-communicate
- Plan to bring up the volunteers on-going commitments and funding pledges for the orchestra
- Emphasize as often as possible that everyone should work together
- Ask the orchestra to help promote volunteer events by utilizing the orchestra's media contacts

Discussion then turned to complimentary tickets: Does any group offer comp tickets to events? How are these accounted for in the budget? How many are given away and to whom?

- One Group 2 offered that they always have a sponsorship structure in place setting out the number of tickets given at each sponsorship level
 - A Group 3 and a Group 6 both have structures based on the amount of money given
- One Group 1 and a Group 3 do not give comp tickets to volunteers
- A Group 2 does not comp senior orchestra staff; does comp musicians; all their active and associate members are required to purchase tickets to the annual fundraising event
- A Group 1 comps orchestra members and the coordinator of volunteer services
- one Group 3 does not comp anyone except the media because it is cheaper to give comp tickets than to pay for publicity
- A Group 3 comps the executive director, marketing director, development director and conductor but not their partners/spouses; the cost is built into the budget.

One participant raised a question about the role of the event treasurer and what best practice policies are around handling/depositing funds. Often, using assistant/event treasurers, checks might remain undeposited for several weeks after receipt. Responses included:

- A Group 5 has one treasurer in charge for all fund collection and depositing; disposition of funds is laid out in by-laws
- One Group 3 has a treasurer for each event; he/she reports to the main treasurer. Their protocol is to email deposits.
- A Group 1's practices vary, but in general, the reservation chair receives the money and forwards it (usually by mail) to the treasurer on a weekly basis.
- A Group 3 offered that their group has just gone through an audit evaluation; there must be checks and balances in place throughout – having only one individual in the chain from receipt to deposit is a potentially dangerous practice

The Conversation closed at approximately 4:01 EST. The final Conversation will be **Tuesday, December 8th at 3 pm ET**; we will discuss, in general, leadership development and the role of a nominating committee. To begin the call, we will complete our fundraising discussions with a focus on credit card best practices.