Kathleen: Good day and welcome to the League of American Orchestras, Opportunities in Arts Giving Through Next-Gen Philanthropy. Our participants are on listen-only mode and we invite you to submit any questions in the Q&A box on your screen. Also, today's PowerPoint is available for download. Click on the file in the download the PowerPoint here box and select download file. It is now my pleasure to turn the call over to David Styers, Director of Learning and Leadership Programs. You may begin.

David Styers: Thank you so much Kathleen and thanks to all of you for joining us today for the leagues highlight digital learning webinars for 2020. As you've seen when you signed on, we're doing a number of polls to get a sense of the diversity of positions who are with us today and also just some quick data of your individual giving program and donor relations. From registration list, we've seen that we have quite a variety of orchestras from their geography around the country and also in their budget size as well.

We'll give you another minute or two to finish filling out these first three polls. Also, just as a reminder, everyone who's attending today's webinar will receive a recording and transcript in a few weeks but after we conclude the webinar today, you will receive an email with the PowerPoint deck as well as the survey to fill out and we'd really appreciate your taking the time to complete the survey so we can get your feedback for our future digital learning program. Kathleen, let's go ahead close at least the first poll on the role of the orchestra positions and show the distribution to get a sense of who's on the call.

So Kathleen, why don't you share the results of the first poll?

Kathleen: Absolutely. You'll see the distribution listed on your screen there. We have about 27% executive directors, 53% developmental staff, 8% other administrative staff, 19% board members, and then about 5% musicians, 2% volunteers, 8% other.

David: Great. Thank you so much, Kathleen. Again, feel free to finish the next two polls, which we'll be closing in a few moments, but again, we are so excited to have the diversity of individuals from the field on this call and it now gives me great pleasure to introduce our presenter today, John Hicks. I'm pleased to learn that John and I are both natives of North Carolina and most importantly John is a trumpet player and we realize we both got our starts and **[unintelligible 00:02:54]** with the North Carolina Symphony.

John now is a certified fundraising executive and a principal and founder of DLB Hicks here in the greater New York area, a consulting practice that provides fundraising, guidance, and support to nonprofit organizations from grassroots to global. Overall consulting career of more than 30 years. John has worked with a diverse and broad group of more than $100 profit both in the US and abroad and he is also a member of the faculty of Columbia University's Nonprofit

Management Program. Some of you may have heard John speak at our Chicago conference a couple of years ago and we're so thrilled to have him back with us today.

I'll turn it over to you, John and again, thank you all for being with us here and enjoy the webinar.

John: Okay, well thank you very much for that great welcome. I am so happy to have the opportunity to spend some time with everybody today talking about something we're all thinking about, which is Next-Gen Philanthropy. We've all been hearing about the issue of wealth generate or wealth transfer and we're also going to talk about how Next-Gen Donors are basically having a bit more input and control of philanthropy and wealth. I'm going to stop for a while because I'm getting an echo here. Okay. We'll try it again. My apologies.

As we're thinking about Next-Gen Philanthropy and how it fits into our own giving, first of all, I think it's really interesting the context we're building through the two polls on giving and whether you're attracting donors by generational information. Looks like we're coming into this conversation where maybe slightly more than half of your reporting increases in your giving and it looks like another roughly 40, 42% are either static declining so those who are experiencing increases in giving, it might be interesting later as we get into some of the Q&A for you to maybe offer, if you will, any observations, feedback, particularly if you're seeing any positive engagements with Next-Gen Donors.

As I'm looking at the poll here on tracking information by generation groups, if you responded, no, you're not alone. This is one of the major challenges that nonprofit organizations regardless of the sector are facing, is being able to essentially get their hands around what percentage of their donors are Next-Gen Donors. What this means is that a lot of us are going to have to make some wholesale changes, maybe some strategic decisions across all of our fundraising that takes into consideration that we have Gen-Xers and Millennials who are, in fact, coming online and are going to play an increasingly important role in the fundraising that we do.

I thought this might be a good place for us to start this conversation today. I found an article from *The New York Times* from January with this great headline "*A New Generation Seeks to Give It All Away Now*." It's an interesting time for anybody who's working in fundraising because with the growing transfer of wealth and responsibility to Gen-X and Millennials, one of the big few changes that we're seeing is that you have a whole new generation of leaders and philanthropists who are really thinking about impact, impact of giving, how does giving make a difference.

I think that's going to be a backdrop to a lot of what I'm going to be sharing with you today, again, things that we're going to be exploring as we go through this webinar, through our questions and our give and take. I'll start here, which is where we all come to thinking about Next-Gen Philanthropy. Right now, we're undergoing the largest transfer of wealth in our nation's history. $30 trillion is slowly but surely being passed along from Baby Boomers to Gen-Xers and Millennials. This means not only that this is cash that's exchanging hands, but there's responsibility that's exchanging hands. This means that we are dealing with those who have direct control of funds, but also we are dealing with influencers.

The question is how do we connect with these influencers and these philanthropists and find relevance and create an opportunity for them to choose our charity as the charity of choice. One place I'm seeing this and certainly in my own practice is and I do a fair amount of practice in the field of foundation and corporate grant-seeking, this is really more of a personal observation, I've been in this business for a little over 30 years and when we look back at the past 30 years in the field of just foundations alone, we find that nearly one-third of the 100 largest grantmakers today were actually founded in the last 30 years. We have never seen such an influential new group of institutional donors come online.

These are foundations that have been created and are really being led largely by Gen-X and Millennials.

This is an interesting illustration of the difference in the landscape so you can see here that on the left we have a group of foundations. These are the 10 largest foundations by giving in 1988. I'm sure you see a lot of familiar names over there. There's a few of them who are really good, solid arts funders. Then we skip ahead 30 years to 2018 and we see our list over here.

Now, first of all, we have five foundations that have managed to remain in the top 10 between 1988 and 2018. Lilly, Ford, Robert Wood Johnson, Kellogg, and the Pew Trusts. There are five newcomers, so to speak, not surprisingly, The Gates Foundation, the Open Society Foundation, which is George Soros, the Hewlett Foundation, the Gordon and Betty Moore Foundation, the Packard Foundation. These are foundations that were created out of tech wealth that are being driven by tech wealth. It's interesting to look at the newcomers. I think one very, very telling number kind of sticks out. I think they are a lot of this. This kind of speaks to how much control Gen-X and Millennials are going to have over philanthropy. If you look at the Bill & Melinda Gates Foundation, this foundation in 2018, gave away almost $52 billion. That total giving is almost as much as the entire list in 1988. You'll notice, I've used consistent $2018. I've calculated this based on the same dollar value.

We see that these particular foundations, particularly the new ones, are driving a lot of the conversation and illustrate again, the decision-making capacity, if you will, of Gen-Xers and Millennials. Part of our conversation today is thinking about how are we going to engage with these Next-Gen leaders, and how do we communicate with them. Again, you're going to hear me talk quite a bit today about relevance because I think that's one of the things we all struggle with, with Next-Gen Donors.

I'm going to turn this to another statistical presentation here. I pulled this from a report called *The Next-Generation of American Giving*, which was put together by Blackbaud in Edge Research in 2017. It's really the most recent study that's taken a look at emerging wealth and emerging philanthropy. I would encourage anyone on this call today after the call is over, to simply go online and you can get a copy of this report directly from Blackbaud. What's interesting is, when you look at average donation per year, and how much of total giving these donors are-- their giving is making up. Be mindful that this is 2016 data. What you see here is that, as of our 2018 data, what we're going to see here is that Millennials, as a couple of years ago, were on average giving a little less than $600 a year to charity.

For Gen-X, we're approaching may be almost $1,000 a year in terms of average donation. These represent uptakes of 14% to 23%. One of the things that kind of jumps out about these numbers is that number one, Millennials and Gen-Xers are giving more, which is great, but the other thing is that the gap between Gen-Xers and Millennials is closing. One of the things that is quite interesting, I think to a lot of people who follow statistics and data in the field of philanthropy, and I have colleagues at Columbia that look at this in a fair amount of detail, is that Millennials may very well be emerging as the most generous generation since Boomers. Literally, the generosity could be "skipping a generation", so to speak, and that Millennials could, in fact, be potentially a very huge market when it comes to philanthropy.

This is a generation that has grown up in an environment where philanthropy has been just more a part of the conversation. This is a better-connected generation. They are more tied to causes, they tend to seek out more causes. They're a challenging group to reach, and we're going to talk about that, but I think the uptake here on all of this is that we have two generations controlling philanthropic decisions, two generations whose philanthropy is growing, and two generations that we absolutely have to pay attention to. Not surprisingly, here we are, our two generations. Gen-Xers, born between 1965 and 1980. I missed it by one year, I was born in '64, and Millennials born between 1981 and 2000. They control wealth, they are generating wealth, and they are advising the distribution of philanthropic dollars. What are our considerations as we look at each group? I'm going to start with Gen-Xers.

Gen-Xers currently are earning roughly 31% of total US income. 31% of wages are being paid into the pockets of Gen-X. In 2017, more than half made at least one gift to charity. These are donors. They have the greatest current influence on Boomer giving and family decisions. This is pretty important because, right now with the kind of transfer of wealth that we're looking at, also is coming a concurrent transfer of responsibility. Probably many of you are seeing this with family giving for your institution, where two years ago, you might have had the patriarch, the matriarch of the family, who was making the decisions. Now those decisions are being passed on to a Next-Generation

child or another member of the family. Therefore, we are at this curse where the responsibilities are changing, and I think also, one of the challenges is, as the responsibility is changing hands, maybe some of the interest is changing as well. Average report in giving, of which I discovered just a moment ago. We have $921 a year on average, but that's almost as close as Boomers. Boomers have been traditionally the most generous donors to philanthropy. Why is that number so close, because as Boomers are heading into retirement, and their golden year so to speak, basically, they're giving less to charity and they are thinking more about big quests and being able to pass along estates to their kids and to their grandchildren?

Gen-Xers are still using traditional family foundations for institutional giving. This is maybe opposed to Donor-Advised Funds. This is something I know a lot of us are thinking about, what has been the impact of Donor-Advised Funds and what connection does it have to Next-Generation philanthropy? Well, the reality of the Donor-Advised Funds are growing and they're not going away, but traditional foundation giving through traditional foundations still make up the preponderance of grant-making in the US. There still are roughly 80,000 grant-makers operating in the US, either as an independent foundation or a corporate foundation, a family foundation. There are for sure, an increasing number of donors, particularly for Gen-X and definitely among Millennials, who are beginning to use community trusts and beginning to use Donor-Advised Funds that are administered by independent wealth management firms and banks to essentially manage their charitable giving.

For Gen-Xers, that Donor-Advised Funds may be less of an issue, but it's definitely going to be an emerging issue for any of us working in fundraising, who are raising money from Millennials? That's something that we're all going to have to look at. How do we, so to speak, make the connections with those donors who may be using Donor-Advised Funds. Hopefully, we'll have some time today on our call, especially as we get to a little more of the Q&A presentation later, our engagement later, to explore that a bit.

What motivates Gen-X? That's always a good question. They favor giving of a voluntary in to support a cause. Voluntarism is on the rise. I just was on a conference call with an organization earlier where we were talking about how for the new modus operandi for getting money from corporations is we have to go to the most volunteer opportunities. Gen-Xers tend to favor writing a check over spending time because, probably not surprisingly, this is a generation that has become caregivers to Boomers. They are assuming more responsibilities in the workplace and in the philanthropic workspace. They have basically less time to volunteer. They tend to support many of the same charities as their parents.

Gen-Xers appear to be making giving decisions based on legacy, so to speak. They want to continue whatever the parents have continued, but, this is pretty important, they tend to favor more entrepreneurial approaches to using money and they're looking for impact. This has been a place for a lot of us that have experienced a bit of a sea change with some of our donors. It's the quintessential case of a foundation that has always just been willing to give us a nice general support check, money with no strings attached every year. Say they're giving a 5,000 or $10,000, they are happy to give it, but then one day, that donor step aside, and the Next-Gen is managing the money, and they now want the money restricted, they want to do things with their money, they want to see impacts as a result of their money. There's a changing conversation that is being driven by this Next-Generation of donors, and I have to say that every charity is struggling with this. Regardless of what the organization does, whether it be at a something the orchestra to be it a hospital, a youth development organization.

One of the things we're all struggling with is how do we demonstrate impact and how do we demonstrate relevance and a lot of this has to do with the need to develop messaging that's going to reach this generation of donors so that they continue to keep us as a priority, in terms of their family, philanthropy. Let's turn to Millennials. Millennials are interesting, right now one out of every three American employees is a Millennial. There's a lot of Millennials in the workplace 51% gave at least one gift to charity in 2017. Over half of Millennials are giving money. They are creating Donor-Advised Funds the fastest.

Each year, there are three pretty significant reports on Donor Advised fund philanthropy that are released. One comes from Vanguard, one comes from fidelity, and one comes from the National Philanthropic Trust. Across the board, and they are looking at their own clients, so to speak, what we're seeing is that the fastest increase in the creation of Donor-Advised Funds are coming through Millennials. These are Millennials who are entrepreneurs, who are making money, who are trying to do good but are using Donor-Advised Funds as a means of giving.

While Donor-Advised Funds are not necessarily driving the boat, so to speak right now, given the ascendancy of Millennials, five years from now we could be having a very different conversation. We're going to need to talk about how do we get ourselves in front of Millennials, really almost on a one to one basis? How do we get them to personally connect with us and think about why we are relevant and why we are important, and how we share their values.

Millennials also stand to benefit the most from the emerging generational transfer of wealth. In other words, much of this money may be skipping directly from Gen-Xers to Millennials. One thing that we're already seeing, is that an increasing number of Boomers are setting up planned gifts vehicles that will benefit grand-kids. Therefore, essentially the Boomers are looking at the kids their own children and saying, "Okay, you've done pretty well. I want to now take care of the following generation." Millennials may ultimately have even more control over Family Fortunes, and family foundations and essentially a fair amount of significant philanthropy.

What motivates Millennials, something we're all thinking about? They tend to support causes were there personally involved. This stands out by the way in the death reports from fidelity and from Vanguard and from the National Philanthropic Trust. One of the things they talk about is how the Millennials who are setting up Donor-Advised Funds are directing dollars to charities where they have a personal connection.

Activism is awfully important for Millennials. They favorite charities that benefit the greater good. Collectively together, these two bullet points constitute well a challenge, opportunity, however you wish to look at it for nonprofit organizations, and it's something that in my own practice, I'm running into a bit, which is interpreting the mission and the work and the values of your charity, your organization, through a social justice or society benefit labs. It really sets a challenge, I realized that most of us on the call today are representing Symphony Orchestras and I may be using language here that is not normally used in this world, but I think there could be some very interesting overlaps and opportunities to recraft messages. Not surprisingly, given the introduction I had earlier about my background as a musician. I feel pretty passionate about the role of Symphony Orchestras and why they're so important to communities and why I think Symphony Orchestras can be really a catalyst for conversation and good.

I think these are the messages that may be needed to resonate with Millennial donors. Not surprisingly, Millennials tend to be very high tech and high touch. This is a donor generation, that values tactile experiences with charities. This is the generation that is going to in real-time, connect with the charity and its work through social media that in real-time is going to respond to requests for support that come through a cell phone. For all intents and purposes, this is a generation that is, really growing up on push-button philanthropy.

One thing that we have to think about is, how can we creatively use technology to connect with these donors with Millennials, and give them the opportunity to participate in the work we do experience, the work we do on a real-time basis and give back to us on a real-time basis.

Kathleen: John.

John: Yes I'm sorry.

Kathleen: Can you repeat the statement about everything mission to a social justice lens?

John: Yes, sure, I'd be delighted to. What I was saying about Millennials is that what appears to resonate with these donors is essentially greater good and activism as you can see here. That one of the challenges we have in our work in fundraising and communicating the work of nonprofits is interpreting the mission and the work and the values of our charity, our organization through a social justice and societal benefit lens. In other words, how does the work of an organization create equity? How does it maybe address certain issues that may be important to Millennials? Is it using art as a catalyst for creating conversation, for example, or using art as a catalyst for community building and just as an aside, you're going to see this if you go out and do some exploring on the grant-making side.

You'll see foundations like The Kresge Foundation, where they have Next-Gen leadership that is already in place and they are already having conversations about using art as a catalyst to build, strengthen, and create community. This is really reliable, it's like a concrete example of interpreting the power of what you do through a very different lens for this group.

What's the Next-Gen Donors' value? I'm only thinking about if we're going to connect with someone we have to know well what are their major their primary concerns? Well, with Gen-Xers, the three things that come out, when you look at a lot of the research that various and sundry individuals have done in looking at generational responses to marketing and communications. Gen-X tends to have values structured diversity and autonomy.

Gen-Xers are basically those that grew up in the '60s and '70s and for diversity is something that's very front and center, and it's been a very important part of the social conversation and the world in which they came of age, so diversity is awfully important. Structure, these are the kids of Baby Boomers and Baby Boomers, essentially, were a generation that did value structure. These are the kids of the 1940s and '50s. They pass that along to the Gen-Xers and autonomy, meaning that they respect organizations that are able to work independently and take responsibility.

What about Millennials? What do they value? Well, Millennials value entrepreneurship, participation, and networking. Millennials are basically those who grew up in a world where we were able or they were able to pretty much access everything they wanted on their own. I called them the push-button generation. They've been able to get information, they've been able to access communication and do this independently. The independent idea of entrepreneurship tends to really resonate with Millennials. By the way, this is one of the reasons I believe that on application forms from corporations and from foundation donors we see a lot more questions about value propositions, what is the value of your work? What is the impact? What is the outcomes? These are the kinds of questions that one tends to ask entrepreneurs. Watch any episode of *Shark Tank.*

Participation, Millennials value participation. I think there's an idea that Millennials somehow are very selfish and self-centered. It's kind of the opposite, if you think about it Millennials are incredibly connected to one another. They may not spend time in the same room but they continue to chat with one another during the course of the day, they build each other into one another's lives.

Participation is very important to Millennials as is networking, being part of something that's greater. Millennials tend to value organizations that can give them opportunities or, I call it tactile experiences, to connect where they feel a part of what you are doing. They value organizations that might, for example, be catalyst to opportunities, to networks, said somewhat plainly, they really like organizations that can put people in a room together. They like organizations that can bring people together and give people experiences. One of the things I certainly have to say to a lot of you on the call today who are here representing Symphony Orchestras, you guys do this several times over the course of the year and it's a powerful experience. You have a really nice mechanism to do these kinds of things with Millennials.

Where's the overlap between these two generations? I'm going to suggest that really when you look at what both groups have in common is that they value nonprofit organizations that come to the table with vision, who are thinking about their value just beyond the work they do on a day-to-day basis, they value charities who come to the table who can show results, where they can point to accomplishments.

They value and trust organizations who essentially are authentic or very true to who they are and understand their place and their role in the community. What all of these has to do with is essentially, can your organization I'm asking this of myself too for every client I work with is, can we craft messages that get all of these things across; vision, results, authenticity? Can we get messages across that suggests that the organization is somehow entrepreneurial in its approach or that it comes to the table as a strong, independent organization?

These are a lot of messages that one has to craft and I think that's why with Gen-Xers and Millennials, we are probably investing more time on communication and education almost as much as we do on actually getting into a room or reaching out to them and asking them or inviting them to make a financial contribution. Communication, as long as we're on the topic, what about communication channels? What did they value? What did they like? Not surprisingly Gen-Xers are phone and email folks.

They grew up in a world where email was cutting edge technology and it's like the most Gen-Xers are just comfortable with phone calls and emails. Millennials not surprisingly, are the generation that grew up on social media platforms and value text messages and appreciate brevity and communication and there's more to follow on that topic momentarily. What do they have in common? This might surprise some of you here, is that both generations seem to value face-to-face interactions.

On the Gen-X side, Gen-Xers grew up in an era where you went down the street to play with the best friends. You went to college at the time where cutting edge technology might have been a Smith Corona Electric Typewriter. You talked to your roommates and you worked in study groups but Millennials are using social media not just for communication but to get themselves into the same room. One of the things I find is very eye-opening for me on a personal level is the time I spend on a college campus.

The sheer amount of interaction I'm watching between young students who put themselves together in clusters and have conversations and it's not really a case of, a group of Millennials who are all scattered in different corners on their cell phones. The idea is using social media to drive Millennials to a place or bring Millennials to a place where they can have that interaction and have that tactile experience. A couple of years ago when I spoke at the League Conference in Chicago I said this to the group and I will say this right now, I am hard-pressed to think of another kind of charity that has the ability to bring people into a room for an empowering experience. I'm hard-pressed to think of a group who can do it better than a Symphony Orchestra. I think that there's a lot of opportunity here, if played correctly, that can make this happen. Something for us all to think about.

What are the impacts that we're all seeing as a result of the current and forthcoming transfer of wealth and transfer of decision making, transfer a power, so to speak, to Next-Gen Donors. I want to talk about four things. I want to talk about how we're seeing changes in family charitable priorities. I would like to talk about changes in how donors engage and decide, how are they reaching their giving decisions. How these generations communicate differently, they are changing the way that we communicate and how do we build trust? What are the new ways that we are being called upon to build trust with Next-Gen Donors? I'm going to start with changes in family charitable priorities and I'm going to use one example as an illustration. In Colorado Springs there's a foundation called The El Pomar Foundation.

The El Pomar Foundation has been a stalwart of community philanthropy. This has been a foundation that for years, operated on the premise of making a lot of contributions to a lot of community groups and the vast majority of those gifts came in the form of general support, unrestricted support. In March of 2019, an announcement came out that basically the leadership of The El Pomar Foundation was being transferred to the son of the other founders, Spencer and

Julie Penrose. He was bringing along with him into the leadership, another Gen-Xer or Matt Carpenter, who's the CFO.

Basically, you have this foundation that's been traditionally run by Boomers and it's just there to do really good work for the community. By the way, El Pomar is still doing really good work for the community. The Next-Gen all coming and here's what we're hearing, how can we provide initial seed funding to keep strategic initiatives moving forward? In some respect that process is a bit like being a venture capital fund for nonprofits. I'm not sure what you're experiencing.

Certainly, through my work, I'm experiencing an increasing number of foundations, where we're seeing messaging like this. There's been a change in leadership, they have moved from a general support type of a foundation "white shoe philanthropy" to now they're being run almost like a venture capital firm. One year we're having a conversation where we come in and we say, here's the great work we're doing, the next year we're being asked for goals, objectives, outcomes. Let's do talk about theory of change and-- It's a different kind of conversation. This is a conversation that really any nonprofit organization in the marketplace has to be prepared to have with this generation of donors. This conversation is just going to change and it's going to stay changed.

One of the things we have to think about, and we'll talk about this shortly is, how can we go back to the messaging that we do and show the planning or demonstrate the planning and vision that's going to be of import and high value to these donors. Here's an idea or here's a thought. Millennial entrepreneurs give more than twice as much of their money and time to charitable causes compared to Baby Boomers or Gen-X entrepreneurs. Basically what we're seeing here is that Millennial entrepreneurs are very, very engaged with the charities that, where they have an interest in an involvement and they tend to follow that interest with a lot of generosity. One thing that we have to think about is how do we engage with these Millennial donors and give them the kinds of opportunities that they may be looking for and where they can bring entrepreneurial thinking to the table.

Again, I think some of this is going to be interpreting the messaging of our work and our value proposition and the other part of it is just creating opportunities for them to find the involvement. As far as engagement, I pulled some colleagues as I was preparing this presentation and that was the thing, I'm really looking for what is the input on how to engage Gen-Xs Millennials and these seem to be like the most frequent pieces of advice and feedback and I certainly concur because a lot of this is what I would say, watch, listen, learn first. This is how these donors tend to look at charities, particularly Millennials. They to come, observe the organization, they'll find you by going out in web surfing.

They get interested in a cause, they tend to come to find you. If someone is sending them a YouTube video of one of your performances and saying, this is the neatest thing I've seen, they're going to come take a look, they're going to listen and then they're going to learn more about your work and then, that leads to engagement. This was something very important that came up in the conversation I was having with colleagues about the engagement, the engagement happens, but it tends to be on their terms, which means that, for some charities, we have to change the way that we're thinking about engagement so if we've traditionally sent out all the mailings or done the appeals or done the galas and basically this is how we create engagement, we might have to rethink it. We might have to think, okay, if we want to reach this audience, where are they, how do we find them or meet them where they happen to exist.

Gen-Xs and Millennials want an informed ask, this is a tough group to raise money from when it comes to walking into a room and making a presentation because they're going to ask a lot of pointed questions and the word why gets used a lot in these conversations. It's not enough that this is what we do well, why do we do what we do? An informed ask is imperative to prepare for with, with a Millennial donor or a Gen-Xer.

For small requests, they want us to make it insanely easy to respond so this is not going to be the generation that responds to mailers, we have to create platforms where they can pick up a cell phone and give us a contribution on the spot or at the very least, we have to make it very easy for them to go online to make that gift and for a larger request, we have to create an easy way for them to be involved.

What I mean by this is finding ways for the donor to be able to easily access our work and see what we're doing without having to go to the trouble of a lot of travel or spending a lot of time. I know that that can be daunting, it's daunting for any charity, but it can't be daunting for those organizations who are in the arts except one of the things I have seen with some arts groups is that you have the ability to constantly put up artistic content so that a donor at any given point can come and experience what it is that you do and can see what it is that you do, they have that tactile experience, so to speak. What about communication? How do we communicate with these donors?

I have four things that I think about them and during my own practice. This first one, less about education, more about entrepreneurship. This is a quote that I took from a presentation by a fairly young program officer from the Pritzker foundation in Chicago and one of the things he was saying is that when asked by me, how do 20 somethings like you working in foundations, do grant proposals? What are you looking for?

He says, well, with proposals then I think I say this for most of my colleagues, if for us it's less about education, it's more about entrepreneurship and what he means by this is that Gen-Xs and Millennials are pretty well informed about the topics that they care about. In other words, they need less background information about the why we're doing what we're doing, it's more of the what are you going to do and how are you going to do it and what are the results that you're going to expect as a result.

Really coming to the table and saying that this is where we are today, this is where we see ourselves a year from now or two years from now and this is how your gift is going to help us get there. Being able to communicate to a gen-X or a Millennial donor, that your charity is on a journey and that you have a destination in mind and that their philanthropy is important to helping you get there, these messages and communication is very important.

The ability to demonstrate impact. This is something that any nonprofit organization, regardless of the mission, regardless of the work struggles with, which is, what can we say about our impact, what kinds of numbers, what kinds of anecdotal information can we produce? Well, it's doubly difficult with arts organizations and I will freely admit that but I think this is why when we talk about the impact of the work and the differences making, having language that, maybe speaks to how a performance, for example, might bring people together or a performance has a message or that those of us on this call who are involved with arts and education programs, how you are using your art form to engage kids and using your art form to engage families and basically serve as a catalyst to some community conversation or bringing community together.

These are the impacts or questions that I'm running into and some of my own work. I've done work here in New York City with young audiences and young audiences in New York City has done a pretty amazing job of thinking through its mission and work in terms of, how does bringing art into a community or into certain areas in the community, catalyze the community as a medium for convening and a medium for conversation. I think any art form can probably you can do this with literally any art form.

The question is for donors who have that level of interest in that type of interest, being able to speak about our mission in that way. What it means to an end-user. This means that we're being asked by Gen-Xs and Millennials to engage in a lot more storytelling. It isn't just here's the work we do, here's the performances that we offer, here are the pieces that we perform, can we tell stories about the impact that the works may have or the experience may have on a member of the audience, or even possibly, again, going back to families and community?

Then finally, and I think many of us can empathize with this one has learned to love haiku. We're now living in a time where when we apply for a contribution from a foundation or corporation, we have to summarize the great work that we do in 250 characters or less. Being able to succinctly and powerfully communicate what we do, this is a given for any communication that we're doing with Gen-Xers and Millennials. Gen-Xers because basically they don't have a lot of extra time, and they're all about structure, and Millennials, because most Millennials grew up mastering the Art of the 144-character or 255-character Twitter response.

Incidentally, I actually had a foundation representative told me recently he, "Says I'm seeing an increasing number of online application forms where I'm seeing the character limits coming in at 250 to 300 characters." He says, "I have to wonder if the people who are designing these forums are basically people who grew up on Twitter." They wanted us to write Twitter responses. So, yes, we have to be able to communicate powerfully, succinctly, and think of it almost the Twitter version of asking for a contribution.

Finally building trust. Building trust with a Gen-Xer or a Millennial really involved five things, which is one, making sure that that donor understands the relevance of your work, and what we mean by relevance is, why is your work important right now, for your community? Why is your work important for your community? What are you using your work? What are you using your art to do that is responding to an opportunity, a question, a need in your community.

Understanding how you work, they need to understand how you operate, and how you do what you do. Understanding your value, why your audiences value your performances, while your community values the orchestra values the arts organization. They need to feel involved. In order to build trust with a donor, particularly Gen-Xers Millennials, they have to feel like somehow they are included and that they have access to the organization and that they want to be part of your work. Having a voice for significant investment is involved. For Gen-Xers and Millennials, the larger the gifts that come in, the greater the chances are that they're going to want to continue to spend time with you and this is why the stewardship and care of these donors can sometimes take a bit more time than with other contributors.

Trust, as we know, is really at the heart of being able to not only bring a donor on board, regardless of whether they're a Boomer or a Gen-Xer or a Millennial but actually keeping the donor involved. I would share this with you that probably the best definition I've ever heard of major gift comes from a guy by the name of Russ Allen Prince. Russ Allen Prince is a donor advisor and he wrote a book back in the 1990s, a seminal work in the world of fundraising called the seven phases of philanthropy. I heard him making a presentation once and the way that he says he's come to define major gifts based on how his clients look at giving is that a major gift is a gift of such size, that the donor feels risk writing the cheque and or the charity feels risk in accepting it.

Mitigating risk, particularly with Gen-Xers and Millennials is an important part of the conversation. Being able to guarantee stewardship and guarantee that their money is being put to good uses is just awfully important to both groups.

I want to talk next about how to build the pipeline of giving from these donors. There's some very good interesting ideas that I have to share-- Except my slide presentation doesn't seem to be moving.

David: John.

John: Okay there we go.

David: Can you clarify what you just said about, was it risk or real about donor and recipient should feel?

John: The risk proposition for a major gift is that the question?

David: Yes. Correct.

John: Yes, sure. Okay. Absolutely. Thank you. Risk. R-I-S-K. Risk. Again, but Russell **[unintelligible 00:55:12]** thing is that major gift is basically a gift where there's risk involved or the perception of risk. The donor feels risk writing the cheque, and or the charity feels risk in accepting it. It's an interesting idea because it takes us away from a natural dollar math. The dollar math is going to be very different for the organization and for the donor, so to speak.

Building a pipeline of Next-Gen giving, how do we engage Gen X? I'm drawing this from the Blackbaud report, and again, I would encourage you after this call, seek it out online and get a copy of it. There's lots of good information there. With regard to Gen-X, the four best practices, so to speak, seem to be this, one demonstrating impact. This is the group that has to understand that the cheque you're asking them to write is going to make some kind of a difference, so it can't just be, "We do great work. We have high quality give us money." It's, "How is our work? How is our programming really making a difference in the community?"

Gen-Xers tend to be the generation that we have to whip this multi-channel communication to reach them. We have to ask them often, we have to ask them in a lot of different ways online mail, it's a retail partnerships and it just means essentially put yourself out there in places where they're going to encounter you. Make it just easy for them to make the contribution.

This is definitely the group you have to ask for more than once during the course of the year. Why is this? Because Gen-Xers are busy, and they, therefore, have divided attention spans. That basically Gen-X still even though they say that they have less time to volunteer, they tend to respond to charities that at least make the opportunities possible, or that you give them an opportunity to possibly do things like donate goods or services, that can be an on-ramp sometimes for a Gen-X donor.

As far as Millennials, these ideas come from my colleague, Derek,

Kathleen: John?

John: Yes.

Kathleen: One question before we go forward it not about pipeline, often for orchestras, pipeline has been around getting better seats for concerts and until you saw the single ticket, then you move people up to subscriber and then you hope those subscribers become for more regular or major donors. This is the harder-to-sell subscriptions to this Next-Gen audience member. How does that relate to what you're saying here about getting them as contributors financially to the organization?

John: Right, thank you very much. I certainly understand that because people I'm sure buy-- by the way, this is as an aside, in the world of sports marketing, Gen-Xers and Millennials buy fewer season tickets, and if they have the same issue. Probably the most direct and way I can say this is that simply one of the things we just have to do is we're going to have to solicit more. What this means is that I think with Gen-X and Millennials, it's probably thinking through number one can I put out literally six

different kinds of appeals during the course of the year.

Some of them may be online, one or two of them may be mail appeals. If you're doing two mail appeals, maybe you're going to combine that with three online appeals. That is one way that you're trying to get out in front of them, so maybe even just a single ticket buyer who's had that one experience, you might be able to rekindle the connection and the interest that way.

It could also be that in thinking through the programming that you're doing. Again, I know you all think about this is, what are the programs and activities that are going to bring Gen-X into your space? Also, are there opportunities for you to go out and meet donors where they are. You guys probably know this example far better than me, but when I was at the League Conference two years ago, I hope I have this correct, but I was hearing the story of an orchestrator. It may have been the Chicago symphony Orchestra that was tried basically as an experiment.

He does sending out chamber music ensembles to perform at busy metro stops during the rush hour. Literally, this is where they're going. They're not going to come and buy tickets and come hear us, we're just going to bring. We're going to bring it to them so at least they have a-- they can be reminded that we are a part of the community. This was all about embedding the art out into the community. I think this is, as much a cultivation activity as a full station activity. It might be really. It's a blend of you've got to take programming out into the community and at the same time, you just have to create a lot of different online opportunity or on-ramp opportunities ranging from mail to online. It's going to vary by community as part of it is knowing your community and a bit of knowing your constituency.

As for millennials, it's a bit more of a storytelling process. My colleague Derrick Feldman is a consultant who does a lot of work in the space of millennial engagement. One of the things that Derek talks about is basically thinking of fundraising more as a storytelling process that you're going to tell a story to a potential millennial donor over time. Either it's going to be active storytelling. You're going to send something to the donor periodically, regularly and you're largely going to do this online and then invite them at various points to make the gift.

Or you basically create essentially a space where they can come on their own volition and learn about the work that you're doing. The idea is that this ties into things like asking them to take some type of action or to donate time to bring their network and to get them involved. The charities, you can do this and I'll freely admit this. The organizations who are doing more social benefit work in the community have a far easier time to do this, probably say than an arts organization. This is one of the reasons I was saying earlier thinking about how we interpret the value of what we do through the lens of community benefit and social justice might be the thing that truly could bring millennials to the donor, and arts groups that I think tend to. This is from my understanding through work with young audiences and the perception of what some and young audiences are doing nationally. The groups that are going out and using art as a catalyst for community conversation and for convening community tend to do pretty well with millennial donors cause that they get.

That they can understand and they do understand the value of and the power of the importance of music and the importance of art. It's just that we have to make the proposition for them.

David: So, John, for those groups that may be sending out the chamber players or having their musicians or young artists in the communities. Do you see that they're actually finding those as successful fundraisers and attracting new donors to the organization?

John: They are probably attracting. Actually in many cases they are attracting because it's either they're attracting the people who are hearing them or it becomes an example that you can present to a donor to say, here is how we are using art as a means of convening and engagement. It's either stands as, here's the way I meet the donor or you go to the donor who you're not meeting and say, here's an example of what we're doing to bring our work out to the community. We're not just going to ask people to come here six times a year

or eight times a year or however often they're performing. Here's what we're doing on an ongoing basis. It's really making the work a bit more ongoing. I don't want to use the word timeless because there are always limits to what we do, but it's just building a different value proposition.

David: Great. Thanks John. I think it is a different generation from what used to be. You set out the one season brochure and that was all you had to do to get your subscribers.

You sent the one direct mail appeal and that all you needed to do for your annual fund the full day through late or over.

John: I certainly understand that. I think that part of it. I--one of the things-- I think I'm going to introduce this idea right now because this is just. I'm thinking about a conversation I had with someone a colleague as I was preparing for our time today. We're back to the topic of social jobs. We were talking about how millennials, white charities that have some sort of a social justice bent to what they do. These are young people who want to make a difference in the world. They're looking for charities that want to make a difference in the world. They're looking for art that makes a difference in the world. I'm talking about something in the orchestras. He looks at me and he's, "Well, but it's classical music. Where's the social justice?"

The first thing that came to mind. This is what I said to them, I said, "Well, there's a ton of social justice stories all over the world of classical music and symphonic music. For example, if you look at, take one word, take the 11th symphony by Shostakovich which he wrote in 1957. The symphony is entitled 1905. It's about the supposedly about the 1905 revolution in Russia. Everybody likes that because it's all about revolutions about Russia. Really what he was probably doing was making a statement about the Hungarian uprising in 1956. It's almost like there's a subtle story to that piece and by the time I finish telling the story, he goes, "If you went on and told that story, you would probably get people to come hear this because there's a story behind it." This is the power that music and the symphony Orchestra can have. Our world contains a ton of those stories. The idea is that, can you build this storytelling around the programming that you're doing? Get people to think about it in a very different way. If you put this storytelling that ties into action, social action, here's one composer that was making a statement that would not have been a popular statement, but found a creative way to make it, that might be the thing that brings millennials to into the concert hall. I just thought that was-- that's my sort of concrete story of how I thought about symphony orchestras and social justice within the last week.

Engagement strategies. This gets back to what we were talking about a little bit earlier.

Meeting donors where they are and creating participatory activities and events, making these activities and events accessible. This is the other thing is how many of you have parts of your performance available to patrons online? I know it's not an ideal thing, but maybe it's a way of connecting with donors or trying to put them into your space. Of course, there's demonstrating relevance and adapting to their concerns. One of the things that we have to think about is how is the art form that we're pursuing relevant or meeting some sort of a relevant challenge or relevant issue. Again, if you look at the community engagement, community building work that's being funded by foundations like The Kresge Foundation, all of this is really about relevance between art and community concerns. Needless to say, building connections through your volunteer leaders.

One thing that I think we all know is that as we're experiencing generational change in our donors, we have to think about generational change in our leadership as well. Bringing on Gen X, there's the millennials who might be able to then connect us into communities and connect us to donors that's going to be awfully important. The solicitation strategies, we've been talking about cultivation and engagement. I mean, really the three types or three categories of solicitation strategies and thinking about millennials and Gen Xers is on the annual fund side. We have to essentially move a lot of our work into the arena of online giving, creating text to give opportunities, and certainly millennials will respond to crowd funding. Now crowd funding isn't something that every organization does, and quite frankly, smaller startup organizations and organizations that are trying to raise money in response to a pressing emergency, do better with crowd funding. But creating easy online versus easy on ramps using technology is very, very important obviously, for millennials.

As far as the major gifts work that we're doing. I think we have to work a lot on messaging, which is we have to be able to make clearer, more concise cases, being able to really value, to demonstrate the value. I call it value demonstration like show me events and tours and storytelling. Pure and simple, telling very powerful stories about the work we do and making the impact absolutely crystal clear to the donor. As far as grants, essentially, what is selling with donors is targeted investments, clear concise cases. Not surprisingly, I think it's always been the case that arts and education has been a big part of the domain of grant funding, not only for symphony orchestras, but for other types of arts groups.

It's interesting. I went into Candid Foundation Directory Online, and I did just a very quick search on contributions to symphony orchestras. One of the things that was just encouraging to me was to see the number of grants in terms of the largest grants that have been awarded over the past few years that are still being given for the commission of works, which I just think is really terrific, and that's a great sign. Not surprisingly, the preponderance of the contributions seem to be geared towards arts and education, arts and the community engagement types activities. The question is, do these fit into our business models? Is it something that we have the bandwidth to pursue, to engage with Gen Xers and millennials in foundations who are clearly valuing that work?

Two thoughts I'll leave you with before we go through some questions and I appreciate everyone's patience with all of this information. One is something I've been talking about more and more, which is something I call maps and legends. It gets back to vision. I think that three tools that a lot of my clients are having to use with younger donors and younger philanthropic leaders are strategic plan. Somebody walking in the door and being able to say, "Here's where we are today. Here's where we need to be two years from now." Showing some sort of maybe a logic model, which is, "Here is what makes our work relevant and here's why it is relevant and here's the change that maybe we're trying to bring." At the very least, a current vision statement that really speaks about the relevance of the work that you're doing. The other which is, of course, not surprising. I want to talk just for a moment about social media channels.

An increasing number of Gen X and millennial donors, and these are donors who create Donor Advised Funds or who are involved with foundation Philanthropy in particular. An increasing number of these leaders are hanging out on LinkedIn, and we're encountering them there constantly. What's important about a platform like LinkedIn, and possibly Instagram, possibly Facebook is that it gives us a platform for storytelling and for demonstrating value. The more that we can spend time in these spaces and talk about the power of our work and the value of our work. It's only going to help us by helping us craft and craft the conversation, so to speak. Something I'm thinking about with all of my clients regardless of what they do and how they do it. Something I would certainly encourage now everyone here to think about are there creative ways we can use these channels to engage donors. You won't look as great for listening to me. I want to take a little bit of time to address some of the questions that you have. I'm eagerly looking forward to hearing what you have.

David: Great, thank you so much, John, for covering a wealth of information and great data and resources. A question that's come in is how can my organization generate interest, and more importantly, passion, and local millennial and Gen X group for engagement and support of live classical and symphonic music performances. More specifically, how do performance arts groups compete for attention among all the others related to underserved segments by children, the poor, healthy, et cetera.

John: Wow. That's a number of questions. My gosh, I think a lot of this comes back to what stories are you telling about the work that you're doing? The real question here is, if someone walks up to you and says-- Come into conversation I had last week was fun. Someone says to me, like, "Why do we even need something in this community? What is it that you do that really makes life here better for people or helps us to think about things differently?" I think there's a lot of threads that you could probably put together to tell that story. You bring community together, you're a point of pride for community. The art form itself can be a means for engaging community and donors. Those are just three ways that you might be able to craft messages and be able to get that across. There were a lot of questions embedded there, so I hope I'm addressing the question. David, if we need to backfill on it, I'm happy to do that, but I think those are the three things that immediately come to mind for me.

David: Great. I think we could probably do a whole new webinar just on those questions. One thing I've been thinking about recently, particularly in watching a lot of pop media, Oscar nominated film television, and just watching the news. I get a sense of fatalism in a lot of entertainment. It may be trying to reflect the mood, but I find it's almost depressing and all that. Whereas I think that we need an antidote to fatalism in the news and everything. I think Symphony Orchestras by the very nature of the great art form as it is, can't do what I do so that there isn't a fatalism when you come out of a concert per se. **[unintelligible 01:18:32]** but still the idea that shared experience I think it's something that could be very attractive to a lot of people right now looking for something from both the connection and pure entertainment value.

John: Oh, sure. There's absolutely no question. I think that's part of it. The other part of the story is, is there other ways again that your orchestra is somehow through the programming that you're doing? Are you basically bringing people into the circle who have been on the outside of the circle? I think that's one of the reasons again, I think that Crowdski and some of the other funders are just so interested in how arts groups are going to be able to take an art form and go into a community that doesn't have access to art. Essentially, use it as a medium for expression and for conversation and engagement. Expression, conversation, and engagement. These are things by the way that young audiences talks about a lot in terms of their value proposition, and that's done pretty well for them with funders up in this neck of the woods.

David: Great. Another question, John, **[unintelligible 01:19:59]** having a better a result from promotion of monthly giving rather than annual giving among next-gen individuals?

John: Absolutely, yes and thank you. I'd like to thank whoever asked that question because you're absolutely onto something that I'm pretty enthusiastic about is that Gen X donors and particularly millennials respond positively to opportunities to just simply literally do a subscription. I will give you X amount of money every month and we therefore make it very easy for them. The nice thing is, when you get that monthly gift, you have a reason to touch that donor once every 30 days by thanking them. That's great, thank you for asking that.

David: Well, that's perfect. Segue to the next question. Is there a difference with how we should acknowledge or that we should thank next-gen donors for annual fund gifts or even for maybe the monthly gift?

John: Well, let's see. I think it's less of question of-- Thanking is important. I think you can thank next gen donors and millennials, Gen Xers the way we normally thank donors. It's fine that you give them the, "Thank you" there it is. I think the difference with these donors is the what happens next. These are donors that actually value some kind of ongoing communication from the charity. This is one big difference that I think I've seen with millennial donors versus boomers. Boomers were always the donors who said, "Only write me once a year, thank me and I don't want to hear from you. Take me off your list, I don't need the messages".

Well, millennials are used to getting messages. They grew up in an environment, invasion environment where people are getting constantly bombarded by messages day in, day out. In some ways, continuing to send messages about your work, be it an invitation to a performance, so you're obviously trying to market to them and sell them tickets, but also sending them little blurbs are-- If you're going and you're doing a community concert or community performance, send them a 35-second YouTube video. Here, I want to show you us with a group of kids in the classroom and here's the work that we're doing. They value that ongoing engagement. Again, it goes back to, "Show me". Yes, you give them follow up to go beyond thank you.

David: That's great. Now say as a millennial, excuse me as a Gen X donor, I love the monthly giving where I put in a credit card number, take the total divide it by 12 but I don't have to think about it again and please **[unintelligible 01:23:05]** taxes by just looking at my year summary **[unintelligible 01:23:10]** statement. Another question about millennials then is are millennials more likely to give when solicited face to face versus tech, social media et cetera?

John: Yes. I think any donor is more likely to give when you get them into a room. I think it's a bit like more lobby the- this is just human nature. I think with millennials when it comes to the whole notion of communication through social media, it's like you can ask them in person and they can say yes in person, but it's the ongoing communication tends to happen through social media, through text, through email.

Interestingly, I was having a conversation with one of my students at Columbia who works on the major gifts office at the university. She's been working in fundraising for about 20 years at Columbia and she said one of the biggest differences in her jobs, she's especially with younger donors, she said, "They don't want me to come spend time with them after they've made the contribution, so I have to go and see them. I have to sit down with them. But once we've had that conversation, and we've built that connection, they just want me to send things over online because they are always moving between places". Remember, this is a very mobile generation. They don't tend to stay in one spot very long. We've had to resort to a lot of online communications.

If it's going to be like anything that's, I would say, that's a longer conversation, she was saying that she's using platforms like Skype and Zoom to actually check in with donors more than actually going and sitting in a room. It's the stewardship is where the media communication, online communication tends to kick in.

David: That's great. From your experience, we love the examples from young audiences, have you encountered any other specific orchestras or any other art organizations that you think have a great handle on all this and are doing really well with attracting millennials and Gen X donors?

John: Well, yes. Young audiences has been more of a hands on thing for me just the client consultant relationship. It's a very interesting question. I'm not sure I do know, just to be honest with you, I'm not sure there is a particular arts group that I could point to. It would be interesting putting this back to the league. If in your work, if you're aware of that there are some orchestras who have done a good job of actually building and increasing their millennial audience. I'm not sure if that information is something that's available through the league.

David: What I thought that opened it up to the hundred people on this call, if any of you want to raise your hand and say that you feel like you have a good handle on this. I recognize you're probably on this call because you're wanting to get a better handle but I'm just curious that anyone on this call feels like they're doing something, particularly those of you who said that your actual individual giving was increasing. We had over 50% say that. What are you doing that's finding that increase call? It has to be coming from probably millennials and Gen X. That's your next generation of donors to continue that increase. Again, if anyone on this call would like to share, we could certainly, again, the **[unintelligible 01:27:03]** unmute your line, I'd love to hear your own stories as well.

As you're thinking about that, for those on the call, one question was specifically about the technology, about Text-to-Give and if anyone- find that do you have any recommendations of platforms or susceptible strategies to do tech giving to engage that more millennial people?

John: Yes. I can share more of an anecdotal, not anecdotal but more of a-- I might give you a global response. As far as the platform recommendations. That's not necessarily something that's in my bailiwick, but again, putting it out to those on the call. If you have a particular platform that you tend to like I would say, maybe you can suggest it through the Q&A. How **[unintelligible 01:28:03]** you think might be the best way for people to share the idea.

As far as Text-to-Give. Text-to-Give works incredibly well in two situations. It works incredibly well during special events when you have what's called the cash call. Everyone's had the nice diary, you had a nice presentation and you're asking everybody to make a contribution, people love to do Text-to-Give at a time like that. For disaster relief and emergency relief, Text-to-Give works extraordinarily well.

Text-to-Give basically works when you either have the donor's attention or you have an emergency and you require an immediate response. If you don't require an immediate response and you don't have- if you're not in the same space as the donor, they tend to just look at the message and then they move on because everyone has short attention spans. That's my sort of general observation about Text-to-Give.

David: Great, thanks, Josh. Elliot came from the MSL said that they've seen an increase in individual giving through place-based art delivery, education, and outreach initiatives and most importantly, a major capital campaign supporting their new system center in Milwaukee. Those certainly are great things to rally any donors, particularly the next-gen and millennial donors as well.

John: Yes, thanks for sharing that.

David: Two other very specific questions about **[unintelligible 01:29:48]**, do you have a good resource for age data?

John: Age data? The clients who I know have been able to track this information use basically list screening. They do periodic list screenings where I think just everyone's on the same page. This is where you take your database and you periodically through a resource like donor search, which I use donor search. Essentially, they screened through the list.

They give you back a bunch of wealth indicators and information. A lot of times that information will include age data on the donor. That's when we have building it back into your database.

David: That was one question I had thought about at the beginning when we did the poll that less than a third knew any of the generational information about their donors for there's more than **[unintelligible 01:30:53]** How do you get that information?

John: Well, honestly, some of the best people who-- the organizations who do an incredibly good job at tracking this information. It's not going to surprise you. It's usually organizations that have a pretty robust major gifts and individual giving shop. It's because essentially if you're tracking good data on your donors, you know their birthdays and you will usually know the birth year as well. Outside of that, I think you have to screen for it. Cause it's really difficult information to get because most of us don't-- are not required to provide a date of birth when we make a contribution. It's either we know it anecdotally by just our, by talking directly to the donor. Or again, maybe through a list screen.

Even with less screens, you're not going to get age data on every single donor but you may be able to get that information for some of your donors. You might go from knowing nothing about your list. You've got 4,000 themes and the database. You might have 40% of them that you have age information, generational information on. At least that's a good starting point.

David: Great. Thank you, John. Another very specific. Do you have any specific readings, suggestions, book, articles, reports to help people become a little bit more knowledgeable about fundraising, particularly for orchestras at this time?

John: I think there's been some interesting-- Well, there's been some interesting studies on generally like arts engagements-- of arts education engagement that's come out of places like the University of Pennsylvania, which I think give us an insight on what foundations are looking for. That might help you maybe help inform some of your searches for foundations that could be interested in the work that you do, and the information you put into proposals. As far as the best practices. Probably, my one stop shop, and I'm not just saying this because you guys are hosting today, would be the League of American Orchestras because essentially you have an organization that does collect best practice data on fundraising. That would probably be my starting point.

David: Thank you for the blog. Again, we're always here to provide the best information we can. For you personally as a CFRE is there any particular blog or website groups that you follow to get information for your own professional development that might be helpful for some of us, all of us well?

John: Well, I mean I have to give each other to the Association of Fundraising Professionals. I've been a member of AFP for 30 years. I like to joke that I joined when I was five,

but AFT has a wealth of information through its website. If you're a member of AFP, you're able to get that information. I also have to give out a huge shout out to Candid,

which is formerly The Foundation Center, but they are now the Foundation Center and GuideStar has merged. There's a lot of really good free information on philanthropy particularly grant seeking that's available through candid. I will-- the website where you can get this information is called GrantSpace. It's the word Grant and the word Space. One word grant space.org. I would encourage everyone to go and take a look at that website cause there's a lot of examples and information that you can download.

David: Great. Thank you, John. Any other questions that anyone has? We're scheduled to go another 25 minutes, but if that is answering all the questions that people have, we can certainly end a little bit early or anything else you would like to add? Any helpful last minute tips or hints to help people continue on this journey, particularly of the big generational change we know that's happening.

John: Sure. What I would just encourage, I think if you think of today has been this really great convening moment for all of us, then I'm not sure if everyone is privy to who all the other attendees are on this call. I have found just honestly the most effective way of generating ideas is basically go to your colleagues. The extent that you continue this conversation offline with one another is probably one of the most powerful things that you can do. I would just encourage everyone to do this. One of the great things I think about being part of a community, something like AFP or the league is that you're part of our community of practice. The more that you can communicate using that community, the better off that you are.

David: Great. Thank you John. I'll just give a **[unintelligible 01:36:36].** Our national conference that's coming up in Minneapolis June 10th through the 12th and our conference website registration will launch next week. It's again a great opportunity to meet with colleagues and also be able to share information and get answers to questions you have for one another. Another question come in, John, about the idea of using LinkedIn and how practical it is to do it and how can it be used?

John: Oh, yeah, sure. I'd love to talk about this but I haven't. I happen to love LinkedIn as just personally speaking, but it's something that I've been really trying to work on with clients. Practically, here's what I would do. I'm going to start with Grants. If you're approaching a foundation or if you're approaching any number of foundations, honestly,

you'd be surprised at how many of the program officers and the foundation directors are on LinkedIn. Honestly, I would go out and I would reach out to them and invite

them to connect. Is everyone going to connect with you? No. You'd be surprised though, that how many will, because people who work in foundations, their job is to get really smart about the industry and the community.

Being linked to you is important because they begin to see what you're doing. That's step number one. Step number two, is to post content that either you created or content that you can share out of newsfeeds. What that does, it basically puts you into a place where you're having your-- you might be catalyst for conversations. I'm going to just speak personally how do I use LinkedIn.

I basically connect with a lot of people in our industry. I am constantly simply reposting news articles about philanthropy, grant seeking, grant making into my feed. People look at it. I'd say on average I put a post up and I might get anywhere from 100 to 300 views. Sometimes it's much higher. The main thing I'm just doing is trying to build visibility so people see who we are and what we do. I, based on this, I've started taking my clients to do the same thing. I've had their program staff begin to post content about their programs and about the community. Basically, you could have your conductor literally.

You can ghost write this for the conductor. Let's say you're performing a Mahler Symphony in two weeks. Put something up there about, let me give you a great fact about the Mahler's fifth, bout Mahler's fifth symphony.

Basically, what that's doing is it's that information is then populating the feeds for any of your corporate leaders, your community leaders, your foundation leaders, your donors for sure. Make sure that you find out if your donors are on LinkedIn. They begin to see these messages. Imagine every other day or every day when they're logging into LinkedIn, there's something from your symphony orchestra there. It could be a photograph of a musician, a post, it could be something really simple, or just a repost of here's a news article that came out last week about the value of symphony orchestras and communities. LinkedIn can be a great place for you, if you will, a great source of content. Again, there's a number of Gen Xers and millennials who are probably hanging out in the space. That's what I would recommend that you do with it.

David: Great. Thank you so much, John.

John: Very welcome.

David: Again, taking advantage of all those social media channels, John mentioned of LinkedIn, Instagram, Facebook, and others, and being able to reach out to people who don't know they need to know about you even yet. Again, I appreciate John your great information today, and we are so excited to be offering this webinar series this year. Just a reminder on the phone that in three weeks, we'll be having our next one on Wednesday, March the 18th at same time 1:00 PM Eastern, and we'll have Rachel Roberts from Eastman talking about how they help your orchestra be a continuous learning organization and the utilizing of case studies to helping you solve problems and challenges that you're facing.

Particularly looking at the work of the Wallace Foundation and the building audience's sustainability reports and case studies. We'd love to see all of you back in three weeks, again, we'll be sending out an email with the PowerPoint presentation and a link to the evaluation immediately and you'll be getting the recording and transcript in the next couple of days. Again, thank you, John. Thank you all for being involved in this great conversation, and I look forward to seeing you again on future webinars and hopefully seeing you at the conference in June in Minneapolis.

John: Terrific. Thank you all.

David: Thank you again, John.

[crosstalk]

John: Thank you.

David: Bye-bye.

John: Bye.