

Building a Compelling Case

Conference 2025

MIEKO HATANO: When we first started putting this panel together, it felt like three very disparate case studies, but we quickly figured out that what we all had in common was this need to express relevance, relevance in our own communities, relevance to our funders, as we are trying to now transition from an original funding model in each of our communities that were within a tradition that we had, whether that's community foundations, things like that. But as those start to become more scarce, it's not that funding is more scarce, it's that we have to look in different places, and we have to tell our cases in different ways, and show how we are important in our communities in different ways. And sometimes we have to get more granular in our communities and invest in our local. And in other ways, we need to really expand our geographic region in order to collect more of our — more fans, really, because our markets in some of our communities might be too small.

And then in some places, we have geographic areas that are so dense with orchestras because there is a love for it, and yet that feels maybe like too much competition. And so I'm really excited for these three case studies, because each orchestra addressed their own paradigm, their own community culture and needs and problems in a really unique way that spanned different budgets. Some were more labor intensive and smaller on the financial side, some did require major financial investment, but then had an equally large effect on increasing their funds.

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So with that, I'm going to introduce all of our panelists today. Myself, of course. Steve Collins, President and CEO from the Hartford Symphony. Shayne Doty, Vice President of Development at the Charlotte Symphony Orchestra. David Fisk, President and CEO of the Charlotte Symphony Orchestra. Daniel Kohn, Director of Audience Engagement, Orchestra Lumos. Sarah Lempke O'Hare, Director of Strategic Partnerships, Louisville Orchestra. Graham Parker, Special Advisor to the Board, Louisville Orchestra. And Roger Sametz, President and Chief Executive Officer of Sametz Blackstone Associates.

So with that, I'm going to have everyone start out by talking about their problem and what they solved. So we're going to go forward now. We're going to start with the three different case studies, talking about their problem, their creative solution, and then the execution of how they created all of it. And then we're going to go into a moderated discussion where we will talk about some different questions that they have in common, and also were disparate. And then we will end with question and answer session at the very end. So don't worry, you'll get your chance to ask questions. So with that,

we will start with Connecticut Orchestra Month, please. Oh, I'm sorry, we're starting with Charlotte. Sorry, early, early. I've only had one cup of coffee.

DAVID FISK: Good morning, one and all. Buenos dias. I'm David Fisk, the President and Chief Executive of the Charlotte Symphony, and this is the story about how we failed to raise 20 million, and instead raise 50. Well, when I arrived at the Charlotte Symphony in July of 2020, I knew that we had as sheer set of problems and opportunities to solve. We had to get through COVID. Clearly, we needed a strategic plan. There was the need for a music director search process to start, because it had already been decided that Chris Warren Green's contract had been completed, and we needed a campaign to solve a problem.

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Because when the symphony was founded 93 years ago, it was without any endowment. And over the years, the symphony had been helped by the way in which fundraising was conducted collectively in Charlotte through the Arts and Science Council and the Foundation for the Carolinas, in a fairly paternalistic way, and it had benefited from the proceeds of a shared endowment campaign, but it was only the extent of having, by 2020, and endowment of about 12 and a half million dollars.

After the Great Recession led to the collapse of workplace giving, the symphony's \$2 million a year from the Arts and Science Council began a steep decline, and the symphony faced almost existential crisis in 2011 that led it being given \$2 million a year for 10 years, buying sufficient time, one hoped, to find a more long term solution to that \$2 million a year that was part, obviously an essential part, of the operating budget. Charlotte has many attractive features to it. One of the fastest growing cities in the US. And we knew that one of the things, that we needed to do is we built the seeds of a campaign, was demonstrate not only were we essential to the health of uptown, but that we had a very important community role.

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In October 2020, the board voted to move forward with a campaign, and a feasibility study was conducted starting in December 2020 that showed us that we could raise \$20 million. Significant slug of money, enough to buy a small time. And in 2021 of June, the board then voted to move forward with that campaign. But by June of 22, we'd only raised \$3 million, and having been involved in fundraising campaigns for some time, it just didn't feel right that we hadn't made a sufficiently strong case to be on track to raise the 20 million.

So in June of 2022 we just drew breath and conducted a new feasibility study with another firm of consultants who came back to us to say, "If you keep doing what you're doing, you'll raise 10, but if you do it differently, you'll raise 50." We said, "Well, we like the sound of that. What do we have to do to raise 50?" And so we began to, with a new Vice President of Development, my colleague, Shayne Doty, recruited, we began to build our campaign in order to reach outside the symphony family for help, and we did that stronger case statement building by articulating our work in the schools in order to attract support from those who believe the symphony's role was more important than simply being an excellent orchestra on stage.

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We linked our fortunes to the image of the city and demonstrated the essential partnership between a thriving city and an excellent symphony orchestra. We showed our community impact more effectively, again, in order to attract support from outside the symphony family, and we played on Charlotte's competitiveness. We did research, and obviously I'm not showing actual data here, because I wasn't allowed to do that, but you can tell from the size of the pillars where we stood against comparable orchestras. And we made the case, playing to Charlotte's competitiveness, that we ought to be sizing ourselves up against parental competitor with Charlotte, Atlanta, and other cities that Charlotte aspired to be, aspires to be like.

We used key developments to add energy to our fundraising, and I mentioned the strategic plan. By this stage, we were already operating it, but we were also well into the advanced stages of our search. And it was extremely helpful to the final success of the campaign that we were able to announce the appointment of Kwame Ryan as our new music director, a rising star in the world of orchestra music, and we were very happy to have got there first, to be the first American orchestra to appoint him as music director.

So we raised the 50 million and announced it just a couple of weeks ago. It came over \$26 million from individuals, seven and a half million dollars from foundations. But what was certainly a deciding factor for us was a decision by Bank of America to get seriously behind this, Charlotte is their headquarters, and we benefited from an initial \$10 million gift from Bank of America. And leadership in the campaign by executives of the bank, former and existing, the former CEO of Bank of America, Hugh McCall Jr., and Brian Monahan, the current CEO, which gave us, of course, a lot of clout in the corporate community, so that we were able to raise more than \$16 million from corporations for the campaign. I'm going to pass it over to you, Shayne to say more about the strategies and some of the actions that we took to be successful.

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SHAYNE DOTY: Thank you, David. One of the things we also want to do is help you develop your own narrative. Our case was really essential in raising this money. And I think one thing that I learned is it's important to just think about the city with the symphony aside, because it's easy to think about your case from a symphony centric position, and you really have to know your city. Think about the strengths, its aspirations, things it succeeds at, the things it fails at, and sometimes those failures you can use. You know, Charlotte had been maligned in past years, sometimes in the national press, for just being a banking city, and we were able to use that, that the arts reflect out a broader image of the city.

And when I travel, sometimes it annoys me that people say, "How are you enjoying Charleston?" Well, if you think about Charleston or Charlottesville, or you think about our neighbor, Asheville, those cities have projected out arts, culture, food, and people know who those cities are. So we've made a big case that the arts bring, that we had one executive who said, "There was a point in time where I realized a strong symphony in the arts help us draw and retain talent." And with these large businesses in Charlotte, they're fighting to get people to move to Charlotte, and if they've never heard of the city or don't know how diverse it is, it can be difficult.

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So those were some of the things we encountered. So what do you add to the community? What resonates? And focus on your strengths. Whatever elements resonate in your community. The realities and aspirations of the city. And your case is essential in lining up leadership. And don't think about campaign leadership as being limited to your board. In our case, most of our leadership for the campaign was not on the board, but they wouldn't have signed on without a strong case and a case that really showed them how we advanced the city. And so that's really important.

We had weekly calls, and those were really important because they were a limited number of people who all had the same goal. We didn't have people out doing rogue things, calling on donors without knowing. They were open time where we said wherever we thought needed to be said. And that's essential. And we shifted as we went along. We had a list of things that we wanted to offer, but if the trend was not running in the direction, we changed those. We changed the amounts. Lessons learned. I was asked to speak about, aim high enough to accomplish something, and have a plan for the first lead gifts.

Campaigns are not textbook driven anymore. The old model were universities where you had a big, thick case study and you had a pyramid of gifts. We knew where our elite gifts needed to come from, but we adjusted as we went along. And own your history. You know, we all have great histories, and

we have some warts here and there. In American history, they talk about the warts. So you have to own it. And we had some financial history, and we developed a one page sheet that we gave out at meetings. We brought it up to people we knew were thinking about that. And then we also had an endowment fund that was restricted in the community foundation just for being able to draw the principle, and that gave donors who were nervous about things an ease.

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And then you also need a case for when you finish the campaign. And so we're on the next case. Bringing these donors who are new to us into our fold more and being able to retain them long after the campaign. Continuing to use the advantage of a new conductor when he travels. We take a delegation, and those kind of things. So thank you.

MIEKO: Thank you, Shayne and David. Next up, Steve Collins for Connecticut Orchestra Month.

SHANE COLLINS: Okay, good morning, everybody. Thank you, David and Shayne, that was really wonderful. So I'm here to talk about Connecticut Orchestra Month, and I'll start by giving a little bit of background. So in case you haven't noticed, Connecticut is a very small state. In fact, it's the third small state in the country in terms of geographical size. Connecticut is about 5,000 square miles, whereas the average US state is 50,000 square miles, and Utah is a whopping 85,000 square miles, right? So of course there's differences in population and density and all that kind of thing, but you get the picture. We're a very small state, and we have very, very many orchestras. Professional, semi professional, community, educational, youth orchestras, and they run the gamut.

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In fact, we figured out that there are at least, we're still not done doing the kind of census, there are at least 40 orchestras in our tiny, little state. So that gives you an idea of the climate there. And in fact, I was saying to Simon Woods when we were doing the Connecticut Orchestra Month, I think we've unofficially determined that Connecticut has more orchestras per capita than any state in the country. So the problems and opportunities that we saw was that, in terms of a problem to be solved, because we're all kind of in each other's backyards, to a certain degree, there was a perception of competition and scarcity of resources, which may be founded to a certain degree in reality, but we realize that there's also an opportunity there to join forces and lift each other up to celebrate this great density of orchestras, instead of kind of hiding from it, or, you know, not acknowledging it.

So thus was born Connecticut Orchestra Month, a way to celebrate that richness. So I teamed up with my colleagues, Elaine Carroll in New Haven Symphony. Elaine's right up front here, if you want to talk with her later. And Russell Jones at Orchestra Lumos in Stamford, Connecticut. Russell is here at the conference, although I don't think he's in the room. And we got to work. So very quickly, we raised \$50 million to support Connecticut Orchestra Month. That's a joke, people. Come on. We did not very quickly raise — we didn't raise anywhere near \$50 million.

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Okay, now that we're all awake. So we saw the opportunity right? And the goals we had was to raise awareness and engagement throughout our great state, attract more new, diverse audiences and supporters, elevate, celebrate, orchestrate, and build a foundation to increase connection to civic leaders and media. I would add to these goals also the desire to establish a platform that we could then build on year after year, so that we can establish some kind of longevity to this work. Our leadership partners were in place. We selected March really kind of arbitrarily, just as a month that has seemed to have a lot of orchestra activity in our state, but avoided major holidays like, you know, December is jam packed and all of that.

We had a very tight time frame to get things together, but that's what we did. So we engaged, first, we created kind of a census of what are all the orchestras in our state and who are the contacts there? We hosted Zoom recruitment calls to get everybody on board and to kind of flesh out the vision. We established two levels of participation. So there was a no cost participation, which included a list and a directory of Connecticut orchestras, and Roger and Dan will tell you more about the nuts and bolts there. And then there was a deeper level that required a financial commitment.

So we came up with a familiar formula to you all being League members. Annual total expenses times .001 or 0.1 percent, right, of your annual budget. And what that allowed those participating orchestras to do is to have their name in the link in the orchestra directory. We developed and provided marketing assets to promote the month, and event listing in a website that was created. And again, my colleagues will talk more about that. So we very quickly signed up 29 orchestras, representing 19 towns, and 48 concerts throughout the month of March. And this is an obligatory screenshot of a zoom call to transition to Roger Sametz. Take it away, Roger.

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ROGER SAMETZ: Thank you. So as a Connecticut boy, otherwise known as a nutmegger, we were excited to be the mostly pro bono partner in bringing this to life. You know, good ideas remain only good ideas until you get them into the heads of the people, you know, who are your target audiences.

So we, you know, started with thinking about, okay, we're going to need visual expression, we're going to need messaging, and the criteria for that up here was really about accessibility and being welcoming and breaking down barriers. As we talked at the beginning of this session, about relevance, you can't really get to relevance until you get people to feel that it's accessible for them. You know, then it comes down to programming.

So we started with the brand identity, a logo, high level messaging, website, and then assets for different communication vehicles. So this may not look like your average orchestra logo, and that's certainly by intent. It may even look like some logo for a sports team, and that was my intent. It used to be totally unimposing. You know, no batons, swishes. You know, god forbid any you know, quarter notes. You know, really inviting and accessible. And the idea, we sort of built a very, again, sort of friendly color palette, deliberately not being particularly sophisticated, and then built a variety of marks. These are sort of badges, because when you have 29 organizations, you know, you don't know what their websites were like, and they have to put this on top of, you know, their images or their website.

So it had to be sort of self contained, punchy, and we came up with the different colors because we didn't know what the environments would be. We developed a high level message that sort of talks to both audiences and ultimately to perhaps state legislatures. Connecticut Orchestra Month celebrates the essential role that orchestras play in our diverse communities, provides extraordinary experiences for people from all religions and regions and backgrounds, sorry, and spotlights the many gifted musicians who make our state home. This March celebration showcases a significant cultural, economic, and educational impact that orchestras have statewide.

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So that's not a message to a attendee. Through performances, educational events, and digital programming, Connecticut Orchestra Month illuminates how our orchestras enrich lives, are central to providing the vibrant arts opportunities that make our state a great place to live, work, and visit. So with a message and a color palette and a mark, we put together fairly simple and, again, on a tight timeline, website. The kind of snappy, you know, way in. Again, emphasis on simple, breaking down barriers, you know, navigations, you could easily get to events, orchestras, press contact, welcome message. Quote from Elaine at the bottom, but again, keeping it pretty simple. And then what really sort of brought the message home is this map, which sort of color codes for professional, community, collegiate, and youth orchestras, and you know, it's pretty well distributed.

Again, there are more orchestras that didn't sign on. This is a pilot program. We're hoping the success of this is going to fill in the map even more, so you can sort of see the list color coded by the different kinds of orchestras and their marks. We then — you know, because we wanted people

actually go to these things and see what was in their backyards, and it's only a month. So the site taxonomy is by week. So you click on any week, and you can see what's going on. Very simple, no long, you know, descriptions where the adagio flows into the allegretto. You know, that was not the audience we were talking to. And you know, it worked. Now we're going to hand it over to Dan. He's going to talk about sort of the more tactical stuff that uses this material across different channels. Dan.

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DANIEL KOHN: Thank you Roger. And also thank you to, Roger, you and your team for creating what you've just seen, that logo, that website, that design becomes really the foundation for being able to market and communicate Connecticut Orchestra Month, you know, to our constituents. The other thing that we needed in order to be able to take it to market was a team. So I want to do a call out to Ashley Fedigan from Hartford symphony, who's here in the room, and also to Katie Bonner Russo from New Haven Symphony, who's not with us today. And together, the three of us took this to market.

So the first thing we did, the three of us, was created a statewide campaign to get this message on out. The statewide campaign included digital ads and print ads and email. We really had the benefit of the Hearst Organization's amazing market reach across Connecticut. You can see — well, you might be able to see in the bottom is their coverage map, which really nicely matches up to the map that Roger showed with the orchestras. So that really gave us a great, efficient tool, because, as you know, we only raised 0.1 percent of the budget. The next thing was, how do we get 29 orchestras who already signed in to participate in marketing?

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So to do that, we did two things. We created a toolkit and a task list. The toolkit had templates. On the left you see, Katie created that, that's a template of a press release, pre-written. Just take the red parts, fill in your orchestra's information and send it out to your media. So that template made it easy. And on the right is a template for a social media post that Ashley's team created. Again, the red call outs, add your orchestra, add your performing details for March, and get it posted. So these templates and toolkits — and these templates as part of the toolkit made it easy.

The next thing was a task list. Telling them what to do in the week before March 2025, at the end of February. Telling them in calendar what to do in March, and then sending them reminders, and then sending them reminders of reminders, and following up and chasing them down. But they got it. So let's look at what they did. Twenty nine orchestras, 90 percent of them, and this was like, as Steve

mentioned, short timeframe. This thing was going in February, and they were signing up and we launched in March, 90 percent of them had it on their website. Three quarters of them had it on their other — the total of the digital between emails and their social and their website, almost half managed to get it into printed materials, program books, brochures, and some even had at concert signage.

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So these orchestras really stepped up. Let's take a look at some of what they did. So these are some of the ads, the website pages from various orchestras in Connecticut. You see more over here. That's an email on the left. So, and concert signage as well. So the orchestras took that toolkit, responded to, you know, being part of this, and took it on out. This is one of my favorites. If you Google Connecticut Orchestra Month, this is just the first of numerous pages. You'll see social media pickups, media pickups and more, and website pickups, and that's pretty exciting. Think about how long it takes to build SEO. This was launched, and this is what you find on Google.

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But perhaps the thing that is really most amazing was that the Connecticut Office of Tourism added Connecticut Orchestra Month to the CT visit website. As Steve mentioned, part of our goal was, in addition, to raising awareness amongst our audiences in our community, but also amongst our community leaders, and perhaps this might be a platform to do it again next year, when the Connecticut Office of Tourism stepped in and did this, they joined us all in a Zoom call. I think we knew we were making progress. So let's take a look at the results. Over 4,000 website visits. Again, think about this short time frame. This wasn't something that was building up over months. This was building up over weeks or perhaps days.

Also, one-third of the orchestras reported that they got incremental media coverage. Think about how much work we all do to get media coverage. One-third of the orchestras got it, including at least two television articles that we got. Over 40,000 social media impressions, over 1,000 engagements of people clicking, 50,000 emails. The 50,000 emails led to 8,000 opens. You know, 50,000 impressions and 8,000 engagements. So in a rather short period of time, we helped our orchestras help each other in our community. And I'll hand it back to Steve.

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MIEKO: Steve, we've got to move along to our next group. So quickly, please.

STEVE COLLINS: Absolutely, yes. Thank you, Dan. So what's in the future? So one thing I do want to mention is we created a wrap up event that was really wonderful on April 15th. We had a gathering of Connecticut orchestra leaders in New Haven, Elaine and New Haven Symphony hosted. We had music, we had food, we had presentations by Simon Woods, which was really wonderful. He provided a national perspective for all the attendees. And of course, we have got a lot of great feedback from our participants on what worked, what wasn't so successful, and what we can do better next year.

Obviously, next time around for 2026, the month will again be March. We need to take a bit more time to get greater activity around the month. And, you know, the the expansion potential here is, is phenomenal. Like I said, the beginning of the presentation, one of the most important things was to establish a platform that we can then build on year after year to keep this momentum going, and that's exactly what we did. So thank you all so much for listening to our presentation, and maybe in 2026 we will raise that \$50 million. You never know.

MIEKO: Thank you so much, Steve. Now, Sarah Lempke O'Hare, Director of Strategic Partnerships at the Louisville Orchestra.

SARAH LEMPKE O'HARE: Good morning everyone. Thank you so much for being here. I'm really excited to see so many faces out there. So I'm going to shape it in that I'm going to tell you a little bit how we got there, what it is, Graham's going to come up and talk a little about how we got there funding wise, and then I'll wrap it up with where we're going. So COVID, for us, was a real incubator moment. It was a moment for us where we got to pause. We had a minute to think about all of these really great ideas that Teddy has had over his tenure, and what might it look like in the future if we started to do things differently, if we started to be more directly involved in and with the communities, not just in the city of Louisville, but across the state.

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And we have adopted this statement, artistic driven civic leadership, as the impetus and our founding thought on how we move forward into the new era of the Louisville Orchestra. So one of Teddy's crazy ideas that's kind of like the joke amongst our staff, as all of Teddy's crazy ideas, was to go all over the state of Kentucky. And so for an orchestra that's, you know, 85 plus years old, who's really only played in Louisville, the staff was a little hesitant, and we had a significant amount of leadership change at that time right around the start of COVID. And I came on, and he's like, "I have this idea, Sarah. What do you think of it?" I'm like, "It sounds really great to me if we could pull it off. I don't really know how we're gonna do that, but cool. Sounds good."

So what we started to do was, I was like, “We can’t do this unless we really start talking to the people in these communities.” So Teddy and I got in the car, and we drove around Kentucky, a lot of Kentucky, many hours in the car, and met with people in very, very remote rural neighborhoods, and we just talked to them. We asked, “What troubles are facing your towns right now? Where are you struggling. If you had the opportunity to have an orchestra visit your town, do you think it would be welcome? Do you think people would enjoy it? Do you think people would show up? Do you think there's any interest at all?”

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And what we found was a surprising amount of people, pretty much everyone we saw, was just chomping at the bit, that they thought everyone would come, that they did not see it as someone as coming in and dropping in and bringing this one thing and leaving. Because our idea was not just to do orchestra concerts and leave. The idea is, how do we bring this resource and lift up these communities that we are visiting? So what does that look like? So like I said, we'll talk about the funding in a minute, but what it looks like is, we have started the In Harmony Tour, and we go around to communities, it takes up about four weeks of our 34 week season, where we have full orchestra performances, we have small ensembles going into schools, libraries, senior citizen centers, playing in parks, community squares.

And with that, we are doing this work in advance of being there and when we get there. So we're building these foundational relationships that are helping to build these audiences, as well as partnering with organizations all across the state. And that includes orchestras. We have about four or five major orchestras in Kentucky, and we do a lot of collaborative work when we come. We have shared community engagement services. We sometimes have shared musicians on stage. So we really see this as an opportunity to have a state provided resource to where we're serving everyone in the state. So I have a little video for you all to hear a little more about it.

[VIDEO PLAYS]

SPEAKER: I thought it was absolutely beautiful. I love the violinist.

SPEAKER: It was wonderful.

SPEAKER: Yeah, it was fantastic.

SPEAKER: We love bringing our music to everyone in Kentucky. That's what's so special about this tour. It means that we get to tape our music and share it with the entire Commonwealth.

SPEAKER: We don't get opportunities like this very often, and it just brings so much to the community.

SPEAKER: They didn't hold back anything.

SPEAKER: We also play styles of music that people have made here in Kentucky, like bluegrass, folk music, [UNINTEL], and we see it all come together on stage.

SPEAKER: You could go [UNINTEL] series and not get that much impact and that much bang for your buck at a rock concert.

SPEAKER: The thing that really matters in the long term is that people who wouldn't have met and wouldn't have shared something, even though we live in the same state, now get to share an experience that becomes binding.

SPEAKER: It brought a tear to my eye and joy to my heart.

SPEAKER: Spine tingling [UNINTEL], Thank you so much.

[VIDEO ENDS]

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SARAH: Yeah, so that gives a little bit of taste of what it's like when we go on the road. Sorry, sorry, sorry. So when we — as he mentioned, we need to have music that is approachable. So it's a great mix. We always find someone who has some connection to Kentucky in some way, and which we are featuring on the road with us. So that looks like Chris Thiele [?]. We've been around with Michael Cleveland and Flame Keeper a couple of times. Their set is spectacular. They're really incredible. And so we find a way to have a set with a local artist or some artist connected to Kentucky, as well as just giving them a really wonderful fun concert.

It can be things that might be familiar, could be things as Teddy calls that are the old and famous pieces. So we really try to make it as approachable. And understanding that we are going to have little bitty kids to all ages at these concerts. We've also had a significant increase in our social media from these. So you would be amazed at how much your little tiny mic can do. So after every concert, our marketing member is catching people on their way out, just asking their reactions, and these little statements have been pivotal for our case and raising funds for the program. And I'm going to make sure, if you want these slides, or would like to learn more about this, I'm going to stay after and I'm happy to get your contact information. All right, so here comes Graham.

GRAHAM PARKER: Thank you. Just to clarify, I was the Chief Executive during all of this as well. So I stepped down in March, that's why my title's weird. But so funding this was a huge priority for the organization. As Sarah said, Teddy had many huge ideas when I arrived, when Sarah arrived, but this one was a massive idea that was utterly unfunded. And I want to get — I want to mention a word here that we're all dancing around, is the word politics, okay? This is where arts and politics and community is going to coalesce right now in this slide, and I want to say that I've done this orchestra work for 25 plus years. This is the most important work I have ever done, because it was bipartisan.

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It blew me away in terms of the assumptions we make about people's political and their funding interests based on who they vote for and who they represent. So this is a moment too, I really encourage you all to cast aside assumptions about people's political parties and their interest in funding the arts, because it's wrong. Okay, and we made the case for this in Kentucky. So, as Sarah said, and as Teddy had the vision for, this was not about what can us bringing a pre-described idea to you and your community and telling you what we thought we wanted you to do, we actually asked the community what they wanted. And this goes with the first point, is that we were there to solve social and actually political things that politicians struggle with.

How to bring community together, how to make resources count across, in our case, a Commonwealth that is very divided, urban and rural. There is a huge chip on their shoulder about the amount of resources Louisville receives versus the rest of the Commonwealth. So we worked with politicians on understanding, in rural communities, what can we do to help you solve your problems? It was the other way around. It was, what can we do for you to solve your problems? Make the arts part of your solution.

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Secondly, hire a lobbyist. This is really complicated work. It's very sophisticated work. And you need to have someone sitting with you at every meeting, with every lawmaker, telling you what the politics are going into that meeting, what you heard, how they translate it for you, and what you do as a result. Oh, I forgot to say, we've buried the lede here. We never told them how much we raised. Sorry, \$4.3 million for two years, and we got it renewed for another two years from the GOP controlled state legislature in Kentucky, okay? Hire a lobbyist. Listen to them all the time. Put every single decision — as Sarah mentioned, we have been all over the Commonwealth. Every decision about where we play goes through a political lens as well.

Which communities are hurting? Which communities need this? How do we show up? Where do we show up? As Sarah mentioned, every community partner, she also puts every single one of those through a political lens. That community group is really dodgy, have, like, had some budget issues, don't partner with them. Partner with this one. This is a continual effort. Don't let up on the gas. And also, finally, don't put small numbers in front of lawmakers. They are used to dealing with 100 million dollar problems, or could be in the case of billion dollar problems, depending on where you're — which state you're in. Don't put a small number in front of them. They will not think you're serious. When we put — when we came up with this number of \$4.4 million, we were like, "That's insane," because the arts giving in Kentucky is like 50,000 here, 60,000 there.

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We asked for 4.4 million. They were like, "Okay." And it was like, "Oh, okay, I guess we're actually talking about this." And so it went on. And I just want to emphasize this is, as Sarah said, amongst the staff when we all got going on this, this was incredibly hard, but it was the most rewarding thing we have all ever done and continue to do.

SARAH: And I just want to — when I say — when he says the political ends. I cannot emphasize that enough. Our lobbyist's name is Julia, and I would go to a meeting with Graham and say, "Okay, this is my plan," and he'd say, "What did Julia say?" And now that he's gone, I am that person on staff, and I'm like, "What did Julia say?" Because everything is run through our lobbyist. This is a great example of that exact thing, running the idea through the lobbyist. So Happy Top Park is Senator Stivers's baby. It is a old strip mine that has been turned into a park, and he was instrumental in making that happen in his community.

[0:43:02.6]

And as we were traveling around, and we were in the momentum of getting ready for that second ask, and we were nowhere near this area, and Julia said, "It is so important that you make sure you

stop by Stivers's district in this run that you are out in Kentucky. Because if you don't stop, I have a feeling that this will slow down our ask." So we like reconstructed everything. The orchestra is literally four hours away from where the small ensemble and Teddy are. And we drove to Happy Top, and we put a performance on, on that mountain top, where the sun set behind the orchestra, and I think it's just such a beautiful image of exactly what we're trying to do, right?

[0:43:54.9]

Like, yes, we're following political needs to help keep the funding going. Yet there was a huge, huge turnout, and this is one of the biggest events that they have ever had at that park. So I think that's just as a beautiful image kind of showing of what all of this coming together.

[VIDEO PLAYS]

SPEAKER: I loved it. I thought it I thought it was just — especially with like the scenery and with like the nature sounds and everything, this was just like a beautiful performance and evening by both the orchestra and [UNINTEL].

SPEAKER: It's an incredible night of music, and you just can't beat it. If you're interested in this kind of music, come out and see it.

SPEAKER: Yeah, I think just the setting was pretty awe inspiring, as it were, and then you add in these really talented musicians, just was, I mean, spine tingling at certain points for me, for sure.

ROBERT STIVERS: People were coming up to me before and after and during, talking about how it was just a great show. An opportunity to see something that would not be able to be seen in the rural parts of the state, unless you go to the city of Louisville. And so when Louisville Orchestra is out in the state, it is well worth your time and effort to even travel a little bit to see a program and a show like this.

SARAH: The man speaking at the end is Robert Stivers. All right, so what does it look like now? So we are in our fourth year, and we are setting out on a bit of an ambitious September. We just recently, as part of the second ask, was getting a mobile stage. Thank you very much to Charlotte. They were a huge thought partner in helping us get this off the ground. We use the same company that they use for their amazing stage. Our truck is very different than theirs. Theirs fits almost their whole orchestra on it. Ours fits about eight to 10 musicians.

[0:45:53.0]

So we have this amazing resource now. So we're trying to figure out, what does that look like when we go into communities? Where does it work? Where does it not work? We are also — we've found now that we've gone through all of these years, that there's a lot of really small communities that we haven't visited because there is no infrastructure for us. There are no hotels, there's not enough restaurants, there's not a lot of all of that kind of stuff. So we are actually stepping out with about 28 musicians, and we're going to be doing six concerts in two weeks in smaller communities that we have not been able to hit yet, but also doing really strategic, high level partnerships with a place called Shaker Village, which has a lot of our shared donors, which is opening up opportunities for more fundraising.

We are going to lots of — Cumberland State Falls Park, which is the biggest park in the state, outside of Mammoth Cave, which is a national park, that we've never been able to partner with. Again, lots more new funding opportunities. So yeah, I think that our relevance for us is talking to our communities. I think what I was found to be so surprising was how many communities are already holding on to the arts and using the arts as a tool to change their communities. So many tiny mining towns, so many small industrial towns are truly using murals, arts community programs, arts shops as a way to revitalize their downtown. And I cannot emphasize enough that, you know, we were in, again, those car rides with Teddy. I very blatantly remember saying, “Teddy, if we get this kind of program, I would stay at LO. This is something that would really — I mean, we would change hundreds of thousands of lives.” And it's true, we have, and it has been, unbelievably, one of the most rewarding things I've ever had the opportunity to do. So thank you very much.

[0:48:04.6]

MIEKO: Thank you all so much for these great presentations. Most of you dealt with these ideas of public perception barriers and those challenges, and I love that much of the public perception that we all internally think about are actually not real. And so I just love that you all in Louisville went out to the rest of Kentucky to find that all out. So as you were all going out and asking these questions, how did your narrative and visual identity evolve to better reflect your mission and your identity within the context of what you were trying to accomplish? Somebody want to go first?

GRAHAM: We stuck really tight to this idea of this artist driven civic leadership. This idea of, what can we do as an arts group to help change society? And that was — we were very clear on it, we were very articulate on it. And even choices, for example, the graphics that were whizzing by very fast, every single one of those — a, we used Kentucky artists. We used Kentucky musicians. Chris Thiele,

Michael Cleveland, Tessa Lark, all born in Kentucky. Actually, Michael was born in Indiana, but we claim him anyway. It's okay. It's just right across the river. But the artists we use for all the imagery was Kentucky. Every single one of those individual pictures is of the theater in your town, and when we get to your town, we sell posters and stuff that celebrate your local. Everything points back to you, not us. That was one of the most important things we did, and we stuck to it.

[0:49:59.8]

SARAH: Yeah, and like we come into these towns with those posters all signed by the musicians, and we hand them off to the civic leader at the beginning of every show. I think it's just those little things make a huge difference. And I forgot to mention, I have our printed impact report on all of these front tables. Feel free to pass them around, and if they wander off, that's fine. But yeah, I just want to make sure that— yeah, we have PDFs too we can send.

SHAYNE: We knew that our community activities would be of foremost interest across the city. But even beyond that, I was struck by Charlotte had — was all about equity with the booming city, means rising costs and issues with housing, affordable housing, and things like that. And this mayor had done an equitable fund that raised a huge amount of money. And I was struck by, you know, most of the donors who were not involved with the arts were really focused on that. And so we talked about, we shifted, and talked about giving the gift of live music to all citizens of Charlotte, and that resonated. And so we had foundations that would say to us, “Well, we really don't give in the arts,” but they got the community aspect of it. And it wasn't just about our concerts, it was really that experience of live music, and so that it broadened. And we made the case about the arts bringing the other community. One foundation is all about community, but they don't give in the arts. And you know, what are — I mean, is there a sector of the world that is more community based than the arts? I think we're all about community.

[0:51:54.6]

STEVE: And just one other little point is the the Connecticut Orchestra Month identity. When the orchestras added that to their website, it was more than just them reaching out to their audience. It was also, in a way, a step of the orchestras coming together in community in Connecticut. So it kind of embodied that, and they were putting their skin in the game in that regard. So that was a step forward.

MIEKO: How did you all bring internal alignment around these messaging? You know, because this is very different, and you will have board of directors and musicians and so many folks and

stakeholders that need to be a part of this to truly become that, right? These are more lofty mission aligned goals.

SARAH: In the case of Louisville, I think we started, you know, come from the top, it was kind of, you know, there was executive leadership, and obviously Teddy and the board were on board, and we had the buy in from three or four critical politicians who made the the appropriations decision. But then for the first two years, because the appropriation cycle in Kentucky is every two years, but it's kind of off of one year you've got to start the process for year three. We worked really hard on measuring everything, communicating everything, taking pictures at everything, so that as we move down, because we had to start selling it kind of underneath. We needed more politicians. We needed not just the board leadership to get. It wasn't just me, Sarah, Teddy, like, we wanted the whole staff to embrace it, which they did.

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Also the musicians. I have to say, our musicians were so on board with this. We were not fighting this. Kind of like rolling your eyes, like, why are we here? They were like, "Oh, my god, this is so much fun. We love it." So we were selling in the whole time. You know, we invited every local politician in their area to come, to give them the microphone at the top. They're politicians, they love to speak. So, I mean, no joke, and they do good at it too. And they also introduce you to all these other people you need to meet in that community. So it was a sales process going through the organization the whole time.

MIEKO: In Connecticut, you all had to actually — internal meant herding a lot of cats in your entire state.

SHAYNE: Yeah, so for Connecticut Orchestra Month, the challenge really wasn't so much internal alignment, it was external, right? But what was really interesting and really gratifying is that what we found when we hosted our initial Zoom recruitment calls, you know, with potential member orchestras, what we found is that there was this great kind of thirst, this desire amongst all these orchestras to be part of something bigger, to have that sense of community and belonging, so that they were talking about something bigger than just themselves. And I think that was really gratifying, and that's what allowed it to come together really quickly and cohesively.

I will say, internally, as far as the Hartford Symphony is concerned, it may be different for some of the other participating orchestras, but for the Hartford Symphony, there wasn't — unfortunately, there wasn't a whole lot of time and energy put on internal alignment. And that was a missed opportunity.

That was kind of a casualty of a short timeline. So that's something that we're going to devote a lot more energy and try to be more successful at next time around in '26.

MIEKO: And just finally, just want to get from each of you, what does relevance mean in your context, and how do you ultimately measure that?

DAVID: I'll take that question and align it with the previous one too. When I came to Charlotte in 2020, it was to find an organization that had really strong relationships among musicians, staff and board, and that was very reassuring, that there was a very positive internal culture. And over these last four years, we've tried very hard to sustain that through our organizational culture committee, and the opportunity for musicians and staff and board to be involved in formulating decisions around the execution of our strategic plan. We were able, through this campaign, to demonstrate the relevance of the Charlotte Symphony to our larger community, but it was incredibly important as we were doing that work to maintain that alignment.

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And you referenced our mobile stage. That was an example of an innovative initiative that came out of one of our board led committees, the Innovation Hub. And we rolled out our mobile stage in April of last year, and it was incredibly important for our process and for the chances of success that we should have a decision of that magnitude to proceed to commission mobile stage and to implement it, endorsed at board level, including with the votes of the musician representatives. That mobile stage is now fully endowed and paid for as part of our campaign. And talking about public funding, it aligns entirely with the driven mission of the city of Charlotte to readdress historical imbalances of equity. And the mobile stage is being fully funded by the city of Charlotte in order to be used in the six corridors of opportunity. So again, I think showing that alignment between public sector priorities and private sector priorities is essential for success.

ROGER: I'll chime in. I think you can't get to relevance until, you know, people have some awareness and want to try things. I mean relevance really means, you know, meaningful to me. So sure, John Williams might be meaningful to me, or Harry Potter might be meaningful to me, but that has a lot to do with familiarity. So if we don't break down barriers and get people to sort of try things, they won't achieve any level of familiarity or comfort. So I don't think — and so a lot of relevance, at least in my head, has to do with programming, but you can't get there unless you break down the barriers and let people in. So our goal was first awareness and accessibility and breaking down barriers so that we could move to get people to experience things that could then become more relevant to them.

[0:58:26.3]

SARAH: I'll piggyback off that. I think, yeah, and in some ways, to me, relevance is access. And it's not just access to these communities of high income, low income, rural, urban. It's access internally. Internally with our musicians, with the board, with the staff. I mean, I'm going to be real. He painted a little bit of a rosy picture for the staff side, because it's taken three solid years of getting all of the staff on board. There is a true sense now that, like, this piece of the work we do is keeping us viable, afloat, impactful, and more so than our actual stage concerts, does it use every single department. It is the most cross departmental thing that we do, where half of our senior staff is on every single run. Because it requires that much staff input from all of us to make it happen. So I think that we all have to buy into it from every single side for it to be relevant and for it to happen.

MIEKO: Thank you all so much. I think that's a really beautiful depiction of really all of us have with the goal of showing up for our communities and for each other. And that's a really big lesson for us. I want to open it up to some questions. We have about 10 minutes left.

[0:59:59.7]

STEPHANIE: I'm wondering if you can speak a little bit to the challenge of finding — oh, thank you. I'm Stephanie from Rochester symphony in Rochester, Minnesota. We have a very small budget. We're in group seven, small staff. And I'm wondering if you can speak a little bit to the challenge of prioritizing the resources needed to start some of these initiatives before the funding is achieved. I heard a comment about using a lobbyist to help get the funding, but obviously that was an investment. With the orchestra month, it looked as though there was probably significant investment in the marketing and all of the time that went into creating those partnerships. And I just — you kind of have to stretch and then get over a hump and you get the funding. But obviously, before that, I'm wondering if you can speak a little bit to the challenge of getting it off the ground on the way to getting the grant.

SHAYNE: I think we were very lean in that sense. We used, in the end, a local consultant who had a firm of two people, one and a half, maybe one was part time, but who knew the city really well. We did not hire a campaign manager. I continued to run the development and run the campaign with my staff. We all work together and the help of our marketing department and others. So it can be done. We originally had printed materials. They were not the right case. We had to toss them out. And then we did our own decks.

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You know, I would plot pictures down with my limited graphic ability, and one of my assistants would make them look good, and then marketing would take it, and then bring them into another level. So we didn't just go out and hire people and do expensive kind of things. We ran a very lean shop. And in the end, your top people in your community, your most experienced business people, will prefer good and solid ideas to flashy materials. And you know, we used to think that it was all the flash and brilliance of the materials, but think about business people in your community who have maybe bought businesses, and they get proposals all the time, and they can see through. So focus on your ideas and your connections and your story.

DAVID: And if I can just add, using the strengths that you have. You have a new music director, don't you? Joshua Lynn [?]? Yeah, she's awesome. She will be a great asset to you.

STEVE: Yeah, I would just add that, for us and for Connecticut Orchestra Month, you know, the key was leveraging existing partnerships and relationships. That's what made it happen. The relationship with Elaine in New Haven and Russell in Stamford, Orchestra Lumos, you know, goes back many years. We've all worked together. You know, that was a partnership that was waiting to happen. Working with Roger and his team, that didn't just come out of thin air. Both Orchestra Lumos and Hartford Symphony had worked with Roger and his team on branding work. And in the case of Orchestra Lumos, it was a huge renaming and branding project.

[1:03:38.1]

So you know, these were relationships that we already had in place that made it easier to get going. And I mean, as far as the finances of it, this was really bootstrappy. There wasn't a whole lot of money involved. The little bit of startup costs the HSO kind of fronted, and then when the participation dues kicked in, that kind of filled in, back filled for it, and made it all work. But it's all about leveraging what you have, the existing strengths and partnerships that everyone has in place. Just finding new ways to think about them, I think.

SARAH: And also we — something I didn't understand fully when I got to Louisville was that, even though many very wealthy folks in Louisville had made their fortunes in Louisville, many of them had come from rural parts of Kentucky. So when you said to them, "We're actually planning on now bringing the orchestra back to Kentucky," they were like, "Oh my god, I'm from Eastern Kentucky, and blah, blah, blah." And then you talk to them and say, "Well, would you —?" So we asked a major donor to fund the lobbyist. I mean, they were like, "Yes." Then we asked another one, "Would you help us with initial marketing costs?" "Yes." Because they were from these rural communities that had been overlooked by the arts, and they were extremely excited to think that their largesse, their success in Louisville, could go back home. So it was huge.

MIEKO: So I think the theme is really human resources, but really thinking about your own human capacity that you have as a leader, your music director, leveraging that, but also having to reframe how you spend your time. I think that's really something that you have to evaluate for yourself and for your mission, and that's one of the unique things about this. I mean, these are three very different case studies of how, you know, relevance is manifested and how it's communicated, and what the outcomes are, but it's something that each organization had to decide, truly, what does relevance mean for us? How do we solve our problems?

And so, you know, these are not necessarily examples of, you should go home and do this exact thing, but it's about how to think about your problems and to get outside of the tradition maybe that you've come to the table with, and really question your assumptions. We have just like one minute if anybody wants to ask one more question. Okay, over here.

[1:06:01.9]

REBECCA NEDERHISER: I'm Rebecca Nederhiser, and I conduct the Wartburg Community Symphony in Waverly, Iowa. And I had just a quick question, and I know this isn't the only metric we look for, but did you notice when your Connecticut Orchestra Month, was there an uptick in ticket sales for — I mean, did you even have a metric in place to really notice that? But you did say, you know, emails and social media. But I know, ultimately, that's all of us, we're thinking that, like, gosh, were there more people in the halls?

STEVE: Yeah, absolutely. So the bottom line is for some of the participating orchestras, yes, there was a noted increase in, you know, kind of year over year for the month of March. Other orchestras, there was not. We did not really have any sophisticated tools in place to measure how much, even amongst the orchestras that had gains, and Hartford Symphony was one of them, we didn't really have any measurement tools in place that could really drill down on, okay, how much of that increase was at least supported or directly because of the orchestra month, versus we had great programming, we spent more on marketing, you know, whatever the case may be. So it was very anecdotal. But the answer to your question is, yes, to a small degree. And again, the idea is that we're building a platform we can build on and expand in subsequent years. So yeah, great question.

[1:07:32.8]

MIEKO: Okay. Well, thank you all so much. Thank you so much to our panelists, everybody here today, to the League, and to our sponsor. Thank you all for being here. And these folks are around. They're your colleagues. So find them on 360, all of that.